



Project Management for Proposal Managers

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Overview

- It's not just about getting your proposal out the door
- It's about responsible use of your company's B&P budget
- It's about how to manage proposal development as you would manage any other project
- Presentation topics are aligned to the Project Management Body of Knowledge (PMBOK®) created by the Project Management Institute (PMI)

Proposal Priorities

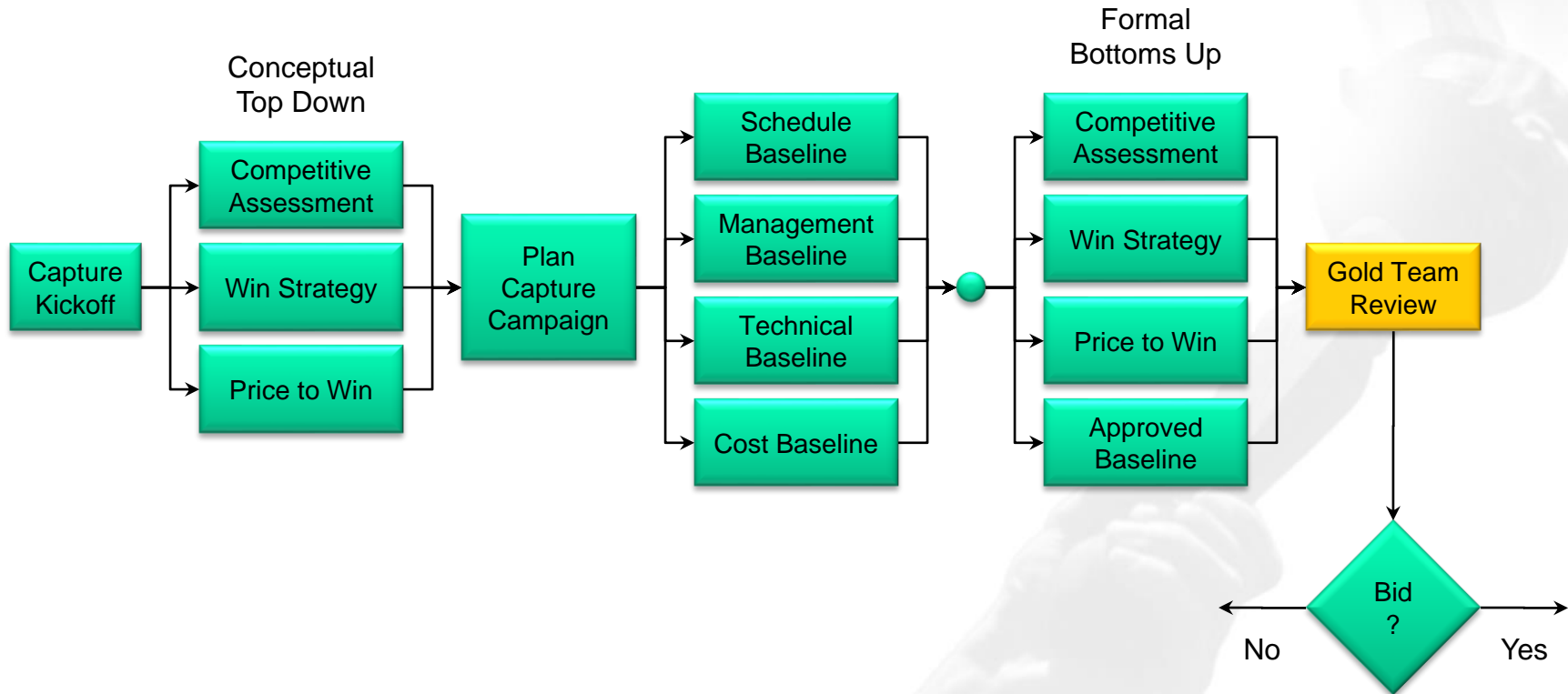
- As a product development project, proposals have a critical time to market – the submission date!
- Your team's effort is focused on getting your proposal out the door
- Your company's effort is focused on efficient use of B&P budget (and winning!)
- How do they know if you are spending your B&P budget wisely?
- How do they know if you have a winning proposal?

What is a Proposal?

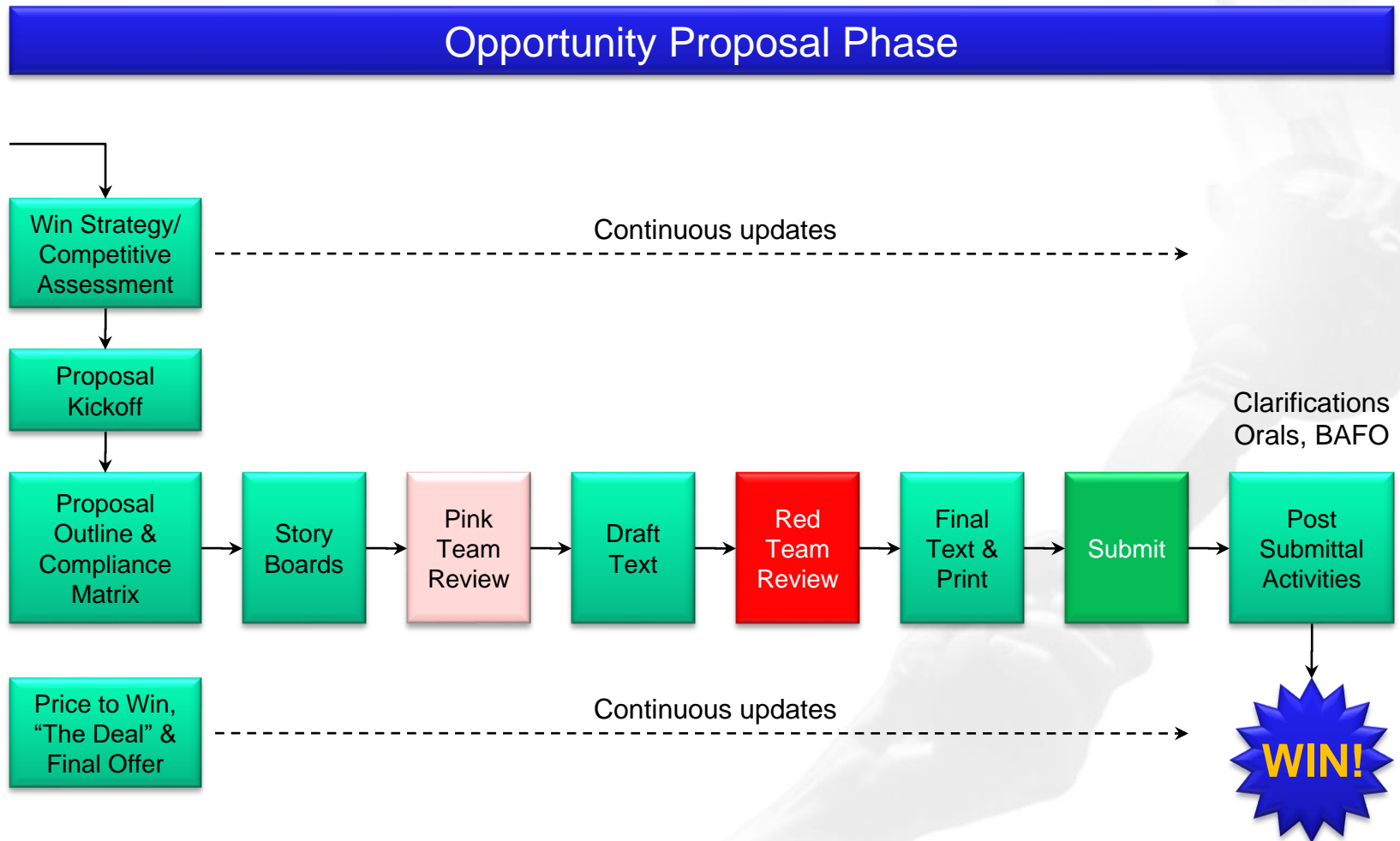
- A proposal, per “Project Procurement Management” in the PMBOK, is:
 - *“...a seller-prepared document that describes the seller’s ability and willingness to provide the requested product.”*
- Buyer is choosing the seller team that will provide the product (or service) at the lowest possible cost/time/performance risk

Proposal Life Cycle – 1

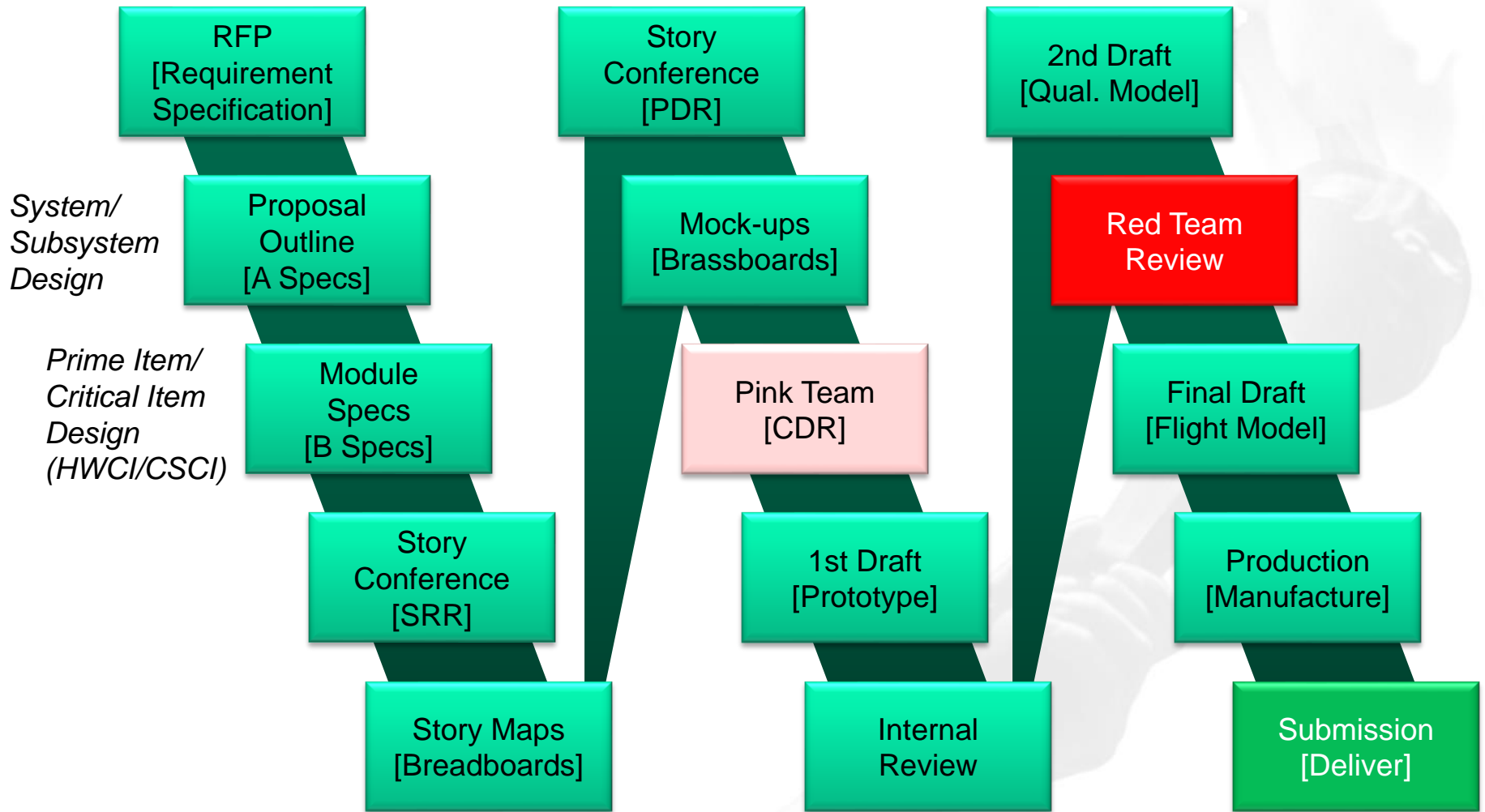
Opportunity Capture Phase



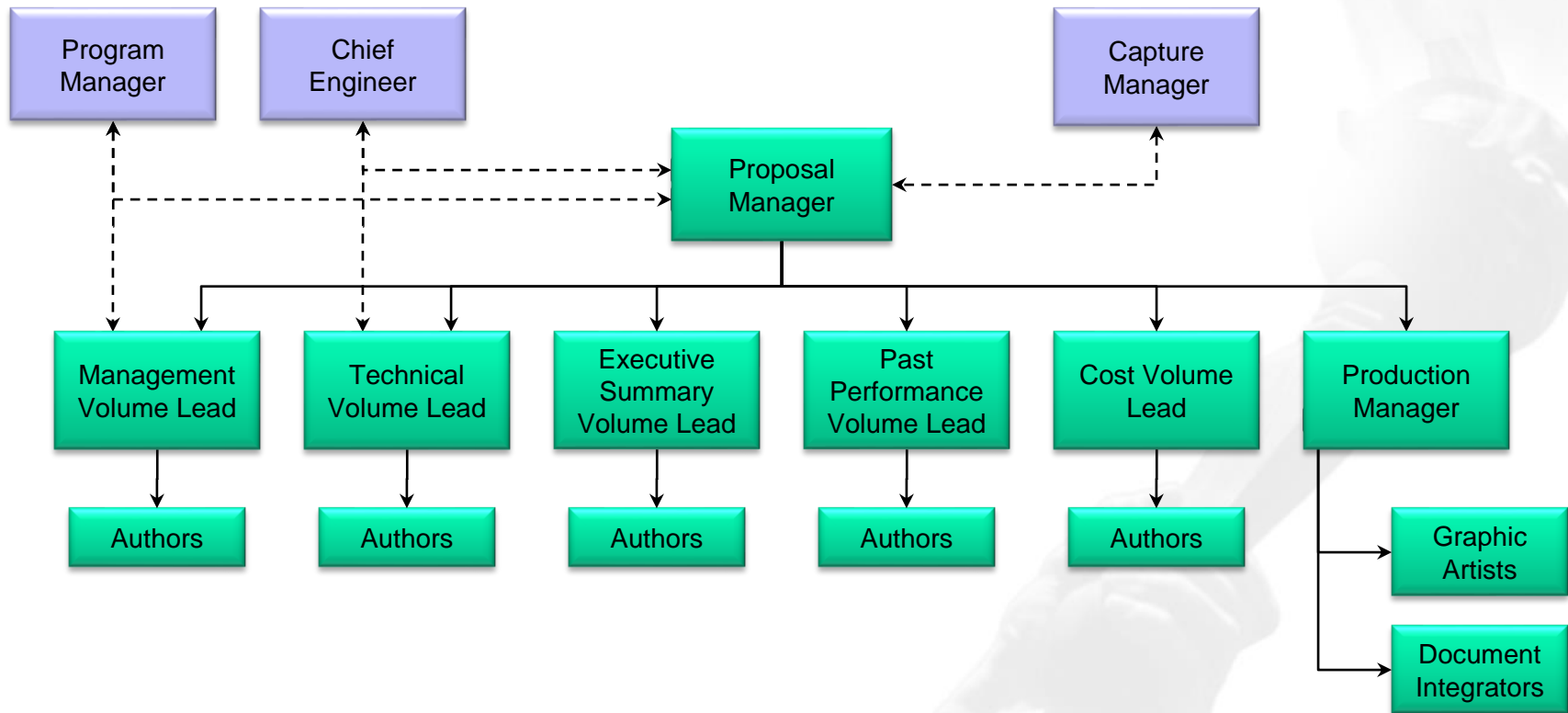
Proposal Life Cycle – 2



Systems Engineering Analogy

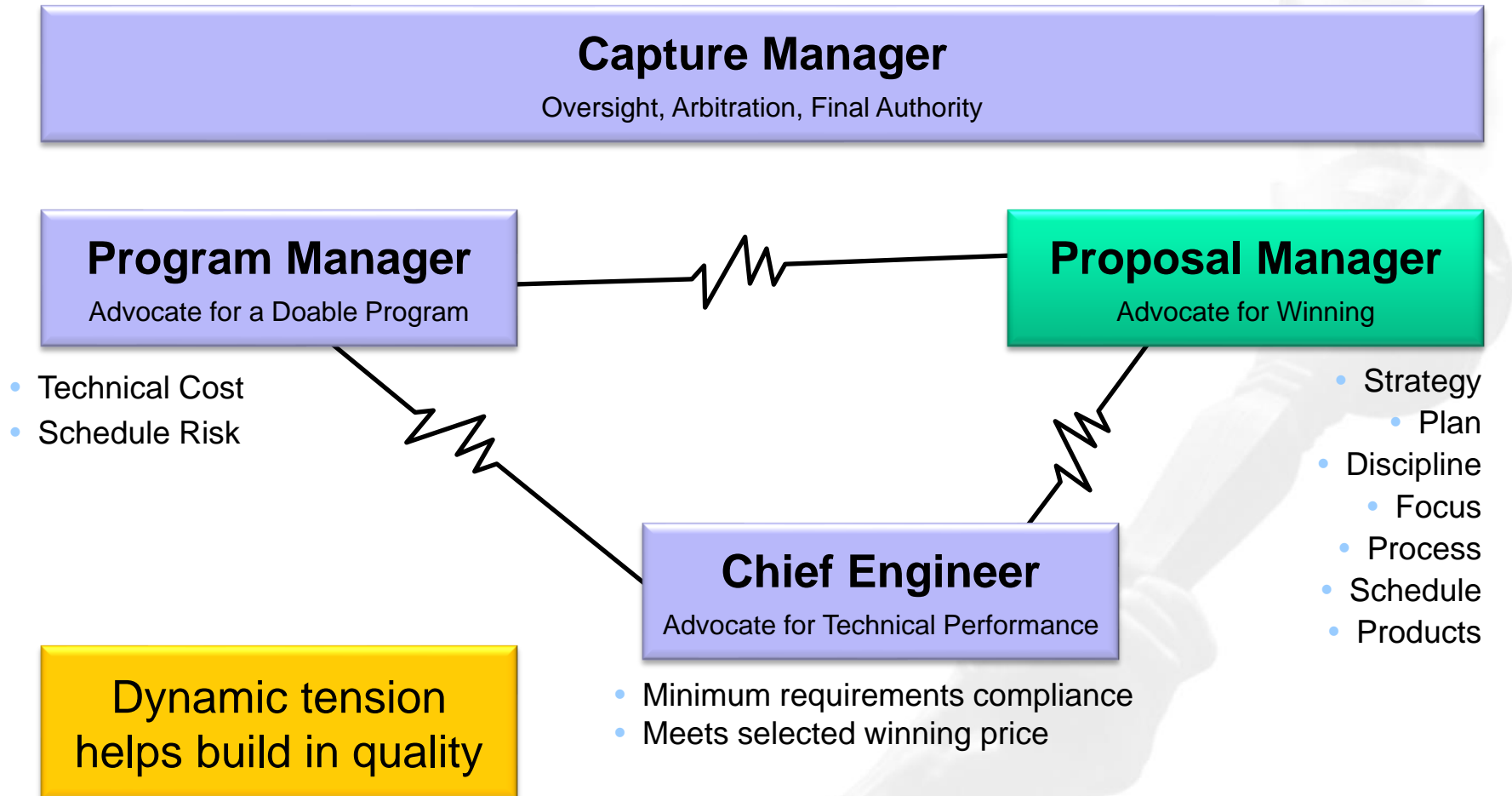


Proposal Team Organization – 1

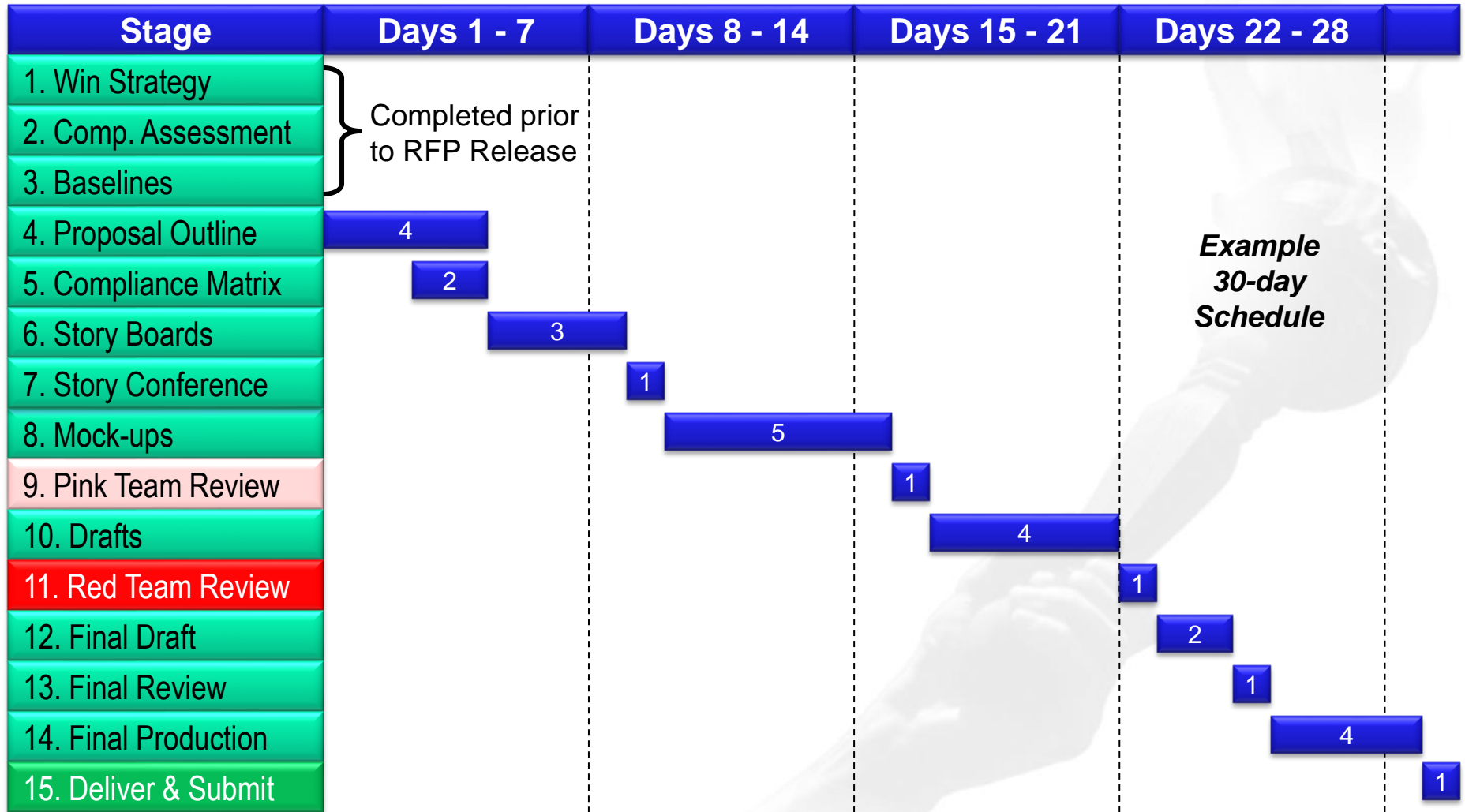


- One author for each 15-20 pages
- Do not assign primary author roles to program manager, etc.

Proposal Team Organization – 2



Project Schedule



Proposal Cost

- Estimate using a time and material basis
- Create proposal schedule and estimate team size
- Assume 15-20 pages per author
- Assume 55-60 hours per week, per person
- Allow contingency for extra staff needed at the end – you can't extend the schedule!
- Track cost against budget weekly

Proposal Quality

- Similar to any product, you cannot build quality in at the end!
- Some keys to a high quality proposal:
 - A comprehensive win strategy understood by your entire proposal team
 - An iterative development process with informal ('wall walks') and formal reviews
 - Regular team communication

Seven Cs of Quality

- **Compliant**
 - Does it meet all customer requirements?
- **Compelling**
 - Will it make your customer want to buy it?
- **Credible**
 - Could you perform the effort? Do they want you?
- **Correct**
 - Is it accurate?
- **Consistent**
 - Across all deliverables?
- **Concise**
 - Is it brief and to the point?
- **Clear**
 - Will the customer get it?

Remember:

- Proposals are scored – not read
- Customers buy benefits – not features

Proposal Communications – 1

- Create (and maintain!) a “Wall of Truth”:
 - Win strategy
 - Baselines
 - Action items
 - Risks
 - Tree of themes
 - Standard terminology
 - Past performance contract references
 - Standard sizes, weights, numbers of things, quantities, etc.
 - Initial acronym list
 - Copy of latest standup charts (schedule), etc.

Proposal Communications – 2a

- Daily Standup Meetings
 - Assemble your entire team
 - Report on schedule, upcoming milestones and meetings, action items
 - Status each module, by volume (see next slide)
 - Status module art, by volume
 - Current news and issues

- Update the ‘Wall of Truth’

Proposal Communications – 2b

Typical Volume Status table

Section	Title	Author	#pp	Story Boards			Mockups			Drafts		
				Rdy	Rvw	App	Rdy	Rvw	App	Rdy	Rvw	App
1.0	Introduction	J. Doe	5	Completed	Completed	Completed	Completed	Due today				
2.0	System Approach	M. Twain	10	Completed	Completed	Completed	Late	Late				

Area of Concern!

Key: **Rdy** = Ready for review, **Rvw** = Reviewed, **App** = Approved
■ = Late ■ = Due today ■ = Completed = Being reworked



Proposal Communications – 3a

■ Weekly Status Reports

- Intended for your senior management
- Highlights risks, actions to manage risks
- Report on proposal status (see next slide)
- Report on proposal financials (expenditure vs. budget)
- Report on all deliverables (volumes, etc.):



Blue – Winning element



Green – Responsive but needs improvement



Yellow – Having problems but recoverable



Red – Management attention required

Proposal Communications – 3b

<i>Item</i>	<i>Status</i>	<i>Trend</i>	<i>Issues and Actions</i>
Win Strategy Implementation	Blue	↓	■ Are we experiencing problems implementing our win strategy? What actions are planned to correct problems?
Proposal Baselines	Green	↑	■ Are our baselines at appropriate maturity levels needed to support our proposal? Have baselines been reviewed by non-advocates and are they documented on the wall?
Staffing/Team Performance	Yellow	↑	■ Do we have the right people? Are there enough authors? Is our team performing well? What actions are planned to correct problems?
Adherence to Schedule	Green	→	■ Is our team meeting deadlines? Is our milestone schedule at risk? What actions are planned to correct problems?
Proposal Infrastructure	Red	→	■ Are there any issues with computers, office space, conference room space, printing capability, and other infrastructure items that are interfering with proposal progress? What actions are planned?

- Blue – On track with no issues
- Green – Mostly on track, minor issues easily correctable
- Yellow – Issues require significant effort to correct
- Red – Management attention required

- ↑ Status improving
- Status steady
- ↓ Status degrading

Proposal Risk – 1

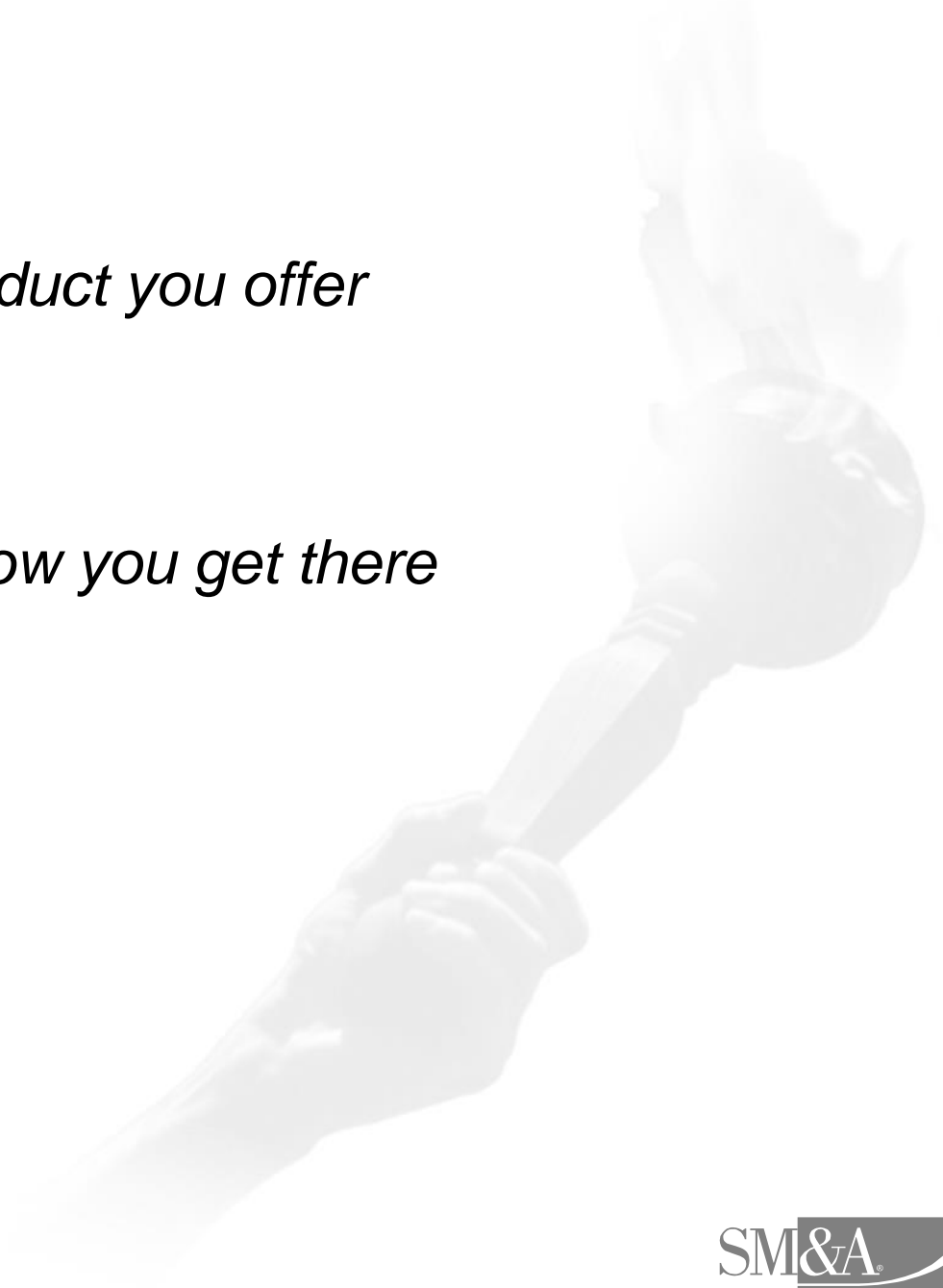
- Managing development risks can incur cost and schedule overruns, but with a proposal:
 - Cost overrun = BAD
 - Schedule overrun = FATAL!
 - Proposals are 'Time-to-Market' critical

“Better an adequate proposal on time, than a perfect proposal a day too late!”
- Tom Andrew, USAF (retd.), ex-SM&A Proposal Manager

Proposal Risk – 2

- Content Risk – *the product you offer*
 - Strategy
 - Deliverables

- Development Risk – *how you get there*
 - Team
 - Schedule
 - Infrastructure
 - Delivery



Proposal Risk – 3

- Proposal Content – Baseline Drift:
 - Most proposals require several baselines, e.g. Technical, Management, Cost, Schedule, etc.
 - Baseline development is often concurrent with proposal development
 - The risk of baseline drift can be avoided with regular, coordinated reviews of each baseline and the proposal content

Proposal Risk – 4

- Proposal Development – Team:
 - Most team members have a ‘day job’ and some don’t want to work on a proposal
 - Collocating your team allows focus, avoids ‘day job’ distractions and promotes communication
 - Remove internal walls but put a wall around your team!
 - Plan replacements in case of illness
 - Plan for extra production during end game

Proposal Risk – 5

- Proposal Team is One Team!
 - Comprises everyone associated with ANY aspect of your proposal
 - Includes Contracts and Finance departments
 - Everyone must participate in reviews, and everything must be reviewed
 - Even Executive Management must honor your proposal schedule!

Proposal Risk – 5

- Proposal Development – Protect Production:
 - Maintain author ‘pens down’ deadline to give production enough time for integration and printing
 - Provide Microsoft® Word training to authors to lessen integration effort
 - Manage artwork to avoid time wasted on unused art
 - Set author page count limits early

Proposal Risk – 6

- Proposal Development – Infrastructure:
 - Ensure everyone has a PC and the appropriate software (especially production)
 - Ensure work is saved to your proposal server, and regular backups are made
 - Ensure you have a document and art configuration management process
 - Ensure you have a backup plan for power failure or natural disaster, and for delivery

Summary

- Manage the proposal as you would any other project
- Plan the effort, monitor progress and report status
- Understand the risks and how to manage them
- Use an iterative development process with informal and formal reviews to ensure quality
- Communicate, communicate, communicate!