

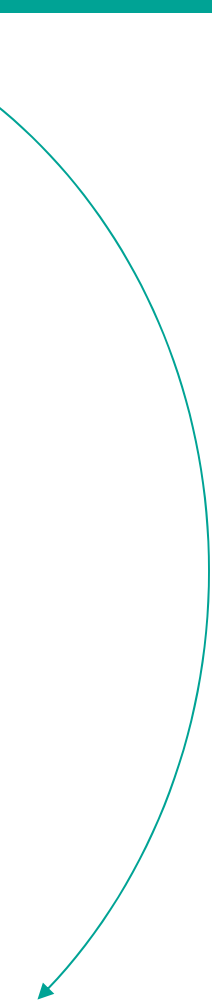
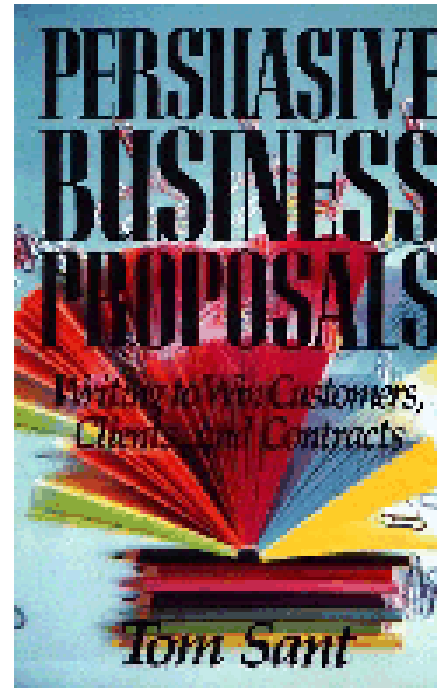
Looking Back... and Peeking into the Future

sant
The Proposal Experts

Tom Sant
APMP
Southern California

Ten Years Ago...

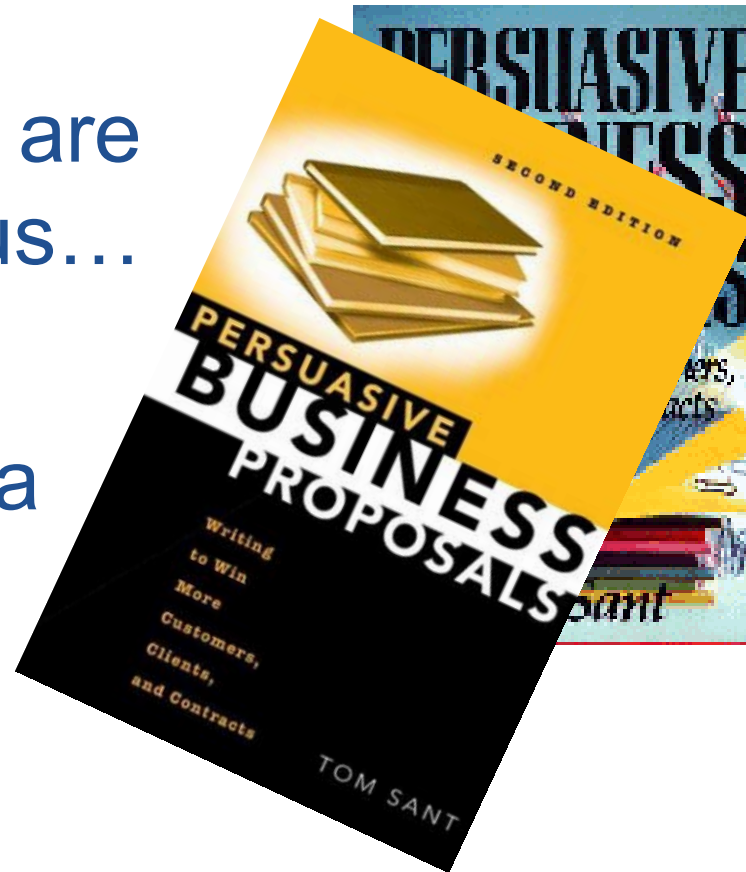
The proposal writing profession was significantly different...



Now...

The changes are enormous...

Enough to fill a book!



Some of the Changes...

- | | | |
|----------------------------------|---|--------------------------------------------|
| • Focus on rhetoric | → | • Foundation in psychology |
| • Use of boilerplate | → | • Personalization |
| • Proposal organizations = silos | → | • Integration into sales, business capture |
| • Paper-based deliverables | → | • Digital media and new delivery vehicles |
| • Physical proximity | → | • Virtual teams |
| • Government-driven industry | → | • Dramatic rise of commercial proposals |
| • Word processing | → | • The Web |

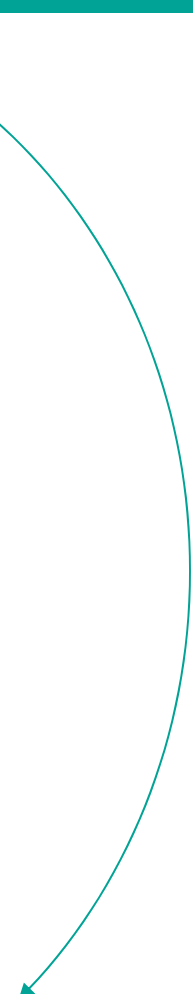
Rhetoric vs. Research

Rhetoric

- Focus on writing style, format, layout issues
- MAP, STOP
- Strong process orientation—proposal writing as project management

Research

- Best Practices study
- Win/Loss analyses
- Performance metrics
- Decision heuristics



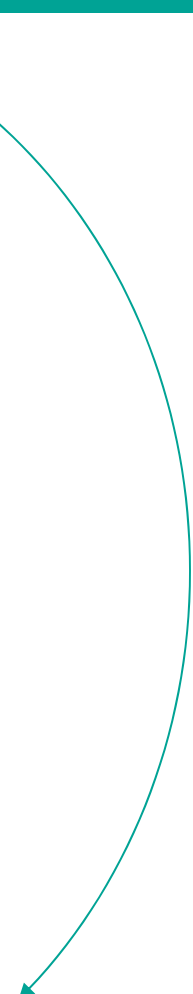
Recent Research in Decision Making

Simple Heuristics That Make Us Smart


Gerd Gigerenzer, Peter M. Todd, and the Research Group
from the Center for Adaptive Behavior and Cognition

Oxford University Press
2000

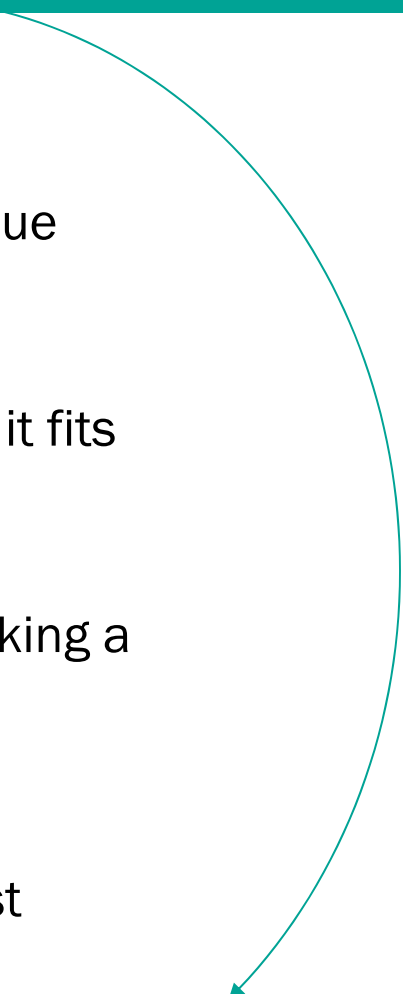
Summarizes research undertaken at the Max Planck
Institute for Human Development (Berlin); Max Planck
Institute for Psychological Research (Munich); University of
Chicago.



Relevance for Proposal Writing

- Understanding how people gather and process information can help us organize a proposal.
 - Understanding how people make decisions can help us structure our message for maximum effectiveness.
 - Gaining insight into which heuristics a customer is using can help us select and prioritize our content.
- 

Seven Heuristics of Choice

1. The recognition heuristic
 - Recognition is assumed to be a positive value
 2. The minimalist heuristic
 - Use any criterion and select the first object it fits
 3. “Use the last”
 - Use the last criterion that worked when making a similar decision
 4. “Take the best”
 - Use the criterion that has produced the best results in previous circumstances
- 

Seven Heuristics of Choice

5. Estimation heuristic

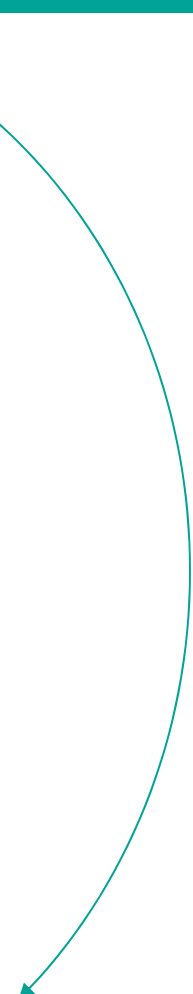
- Estimate the probable rate of return and choose the option giving the best ROI

6. Categorize by elimination

- Compare objects to a set of characteristics, moving through increasingly specific sets until there are none left

7. “Satisficing”

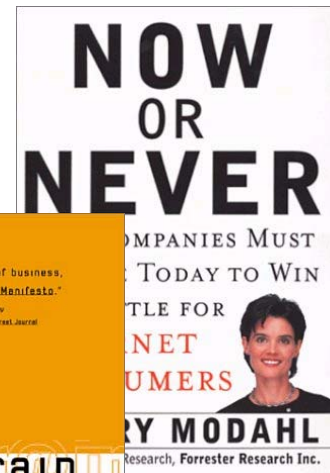
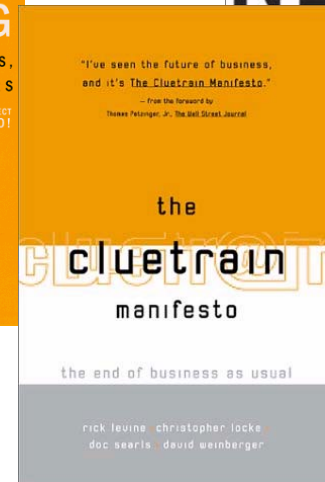
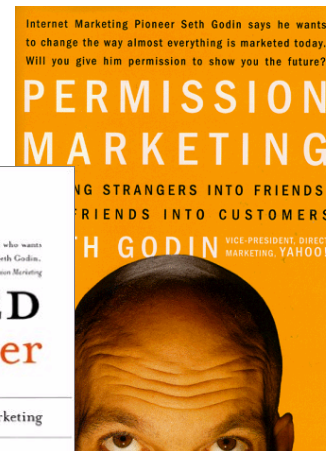
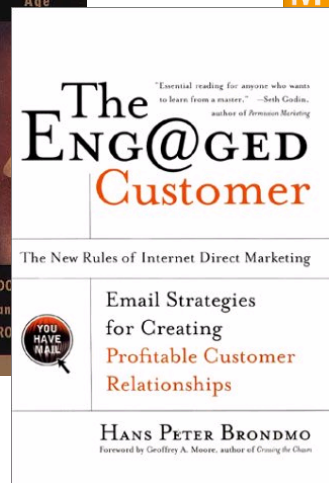
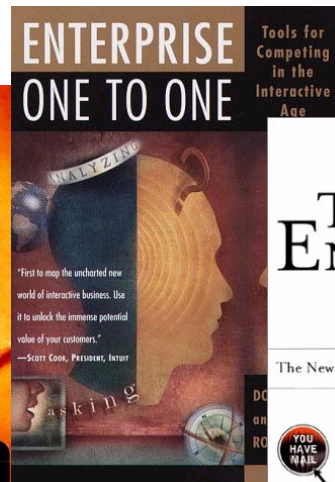
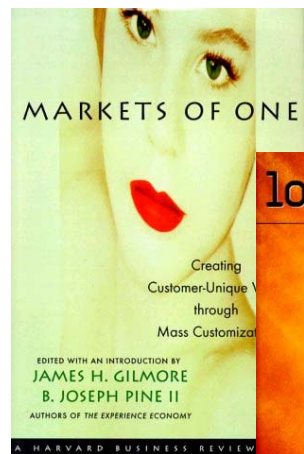
- Establish a standard of “desirability” and choose the first option that exceeds that standard



Boilerplate vs. Customized Content

The eCommerce revolution :

- Mass customization
- Collaborative filtering
- Directly addressing the customer



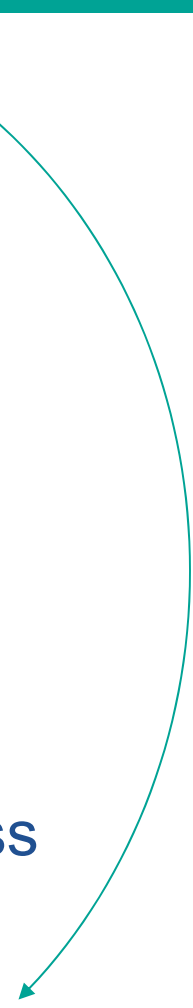
Proposal Operations...in a silo?



Ten years ago...

Proposal operations
tended to be in a
“silo” —

And somewhat isolated
from business
development/business
capture processes



Now the ideal in an integrated operation



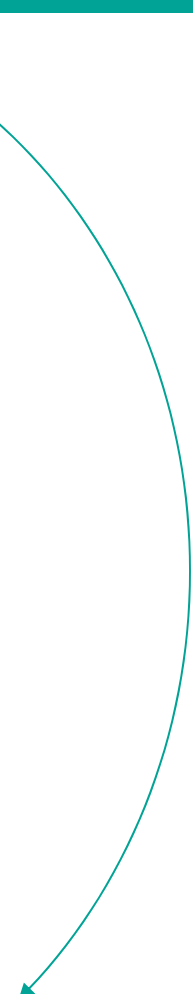
From Paper to Digital Media

Proposal development and preparation

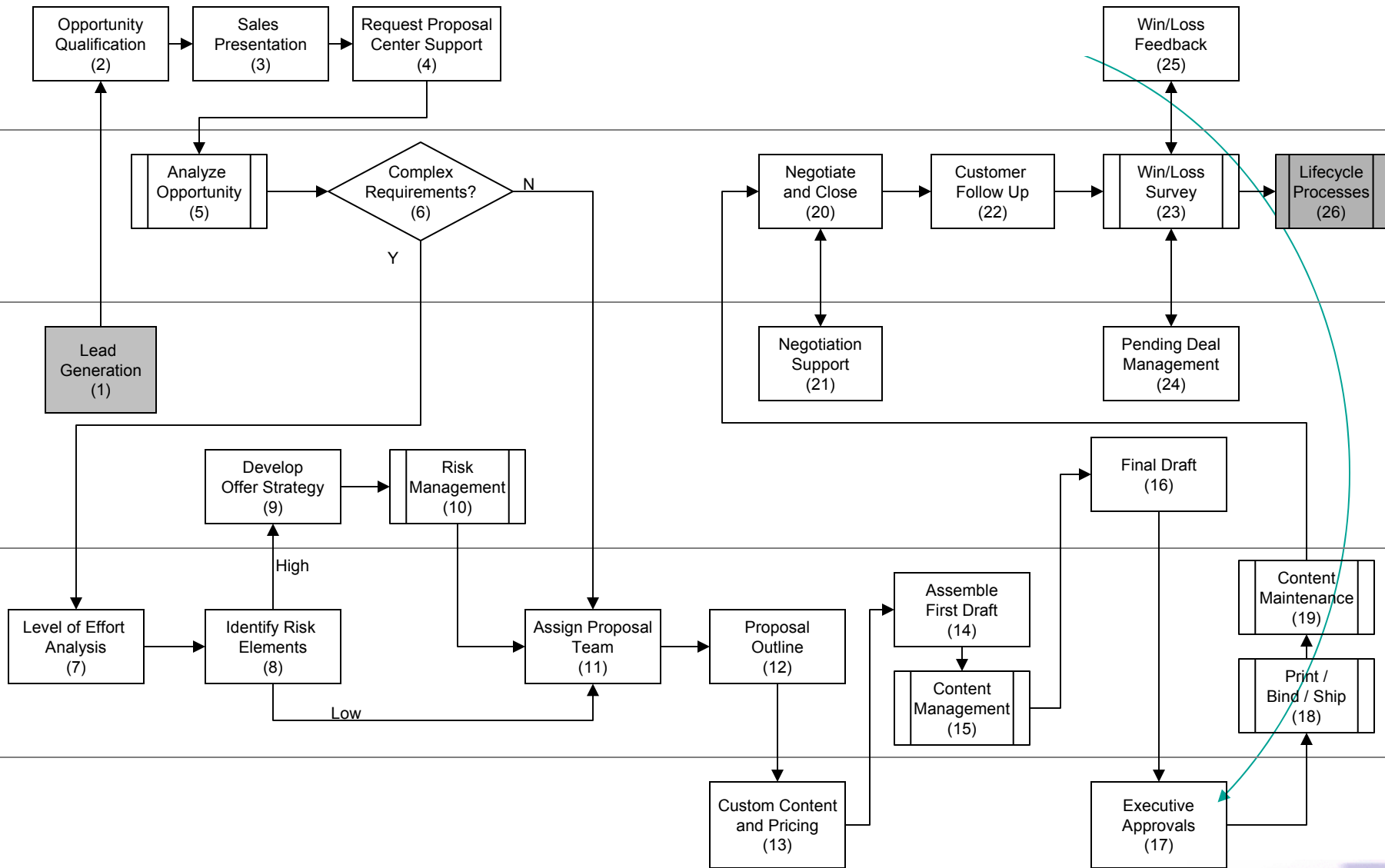
- Biggest potential for eliminating significant number of non-value adding steps:
 - Master document files
 - Passing documents back and forth
 - Incremental builds

Proposal deliverables

- May include digital components (video, audio)
- May include Web conferencing for orals
- May be delivered over the Web, no hard copy



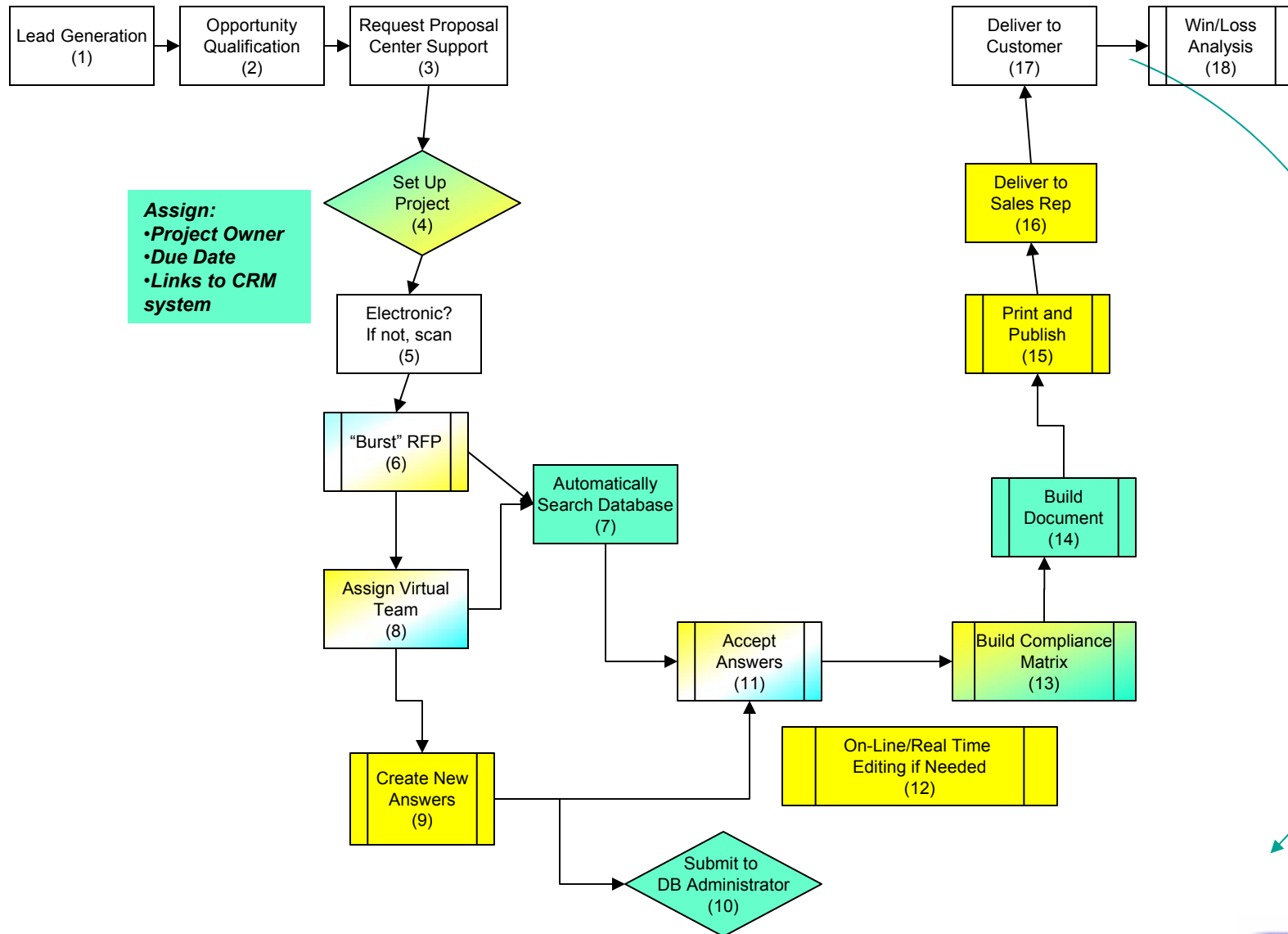
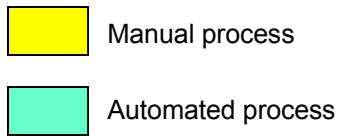
Typical Work Flow circa 1993



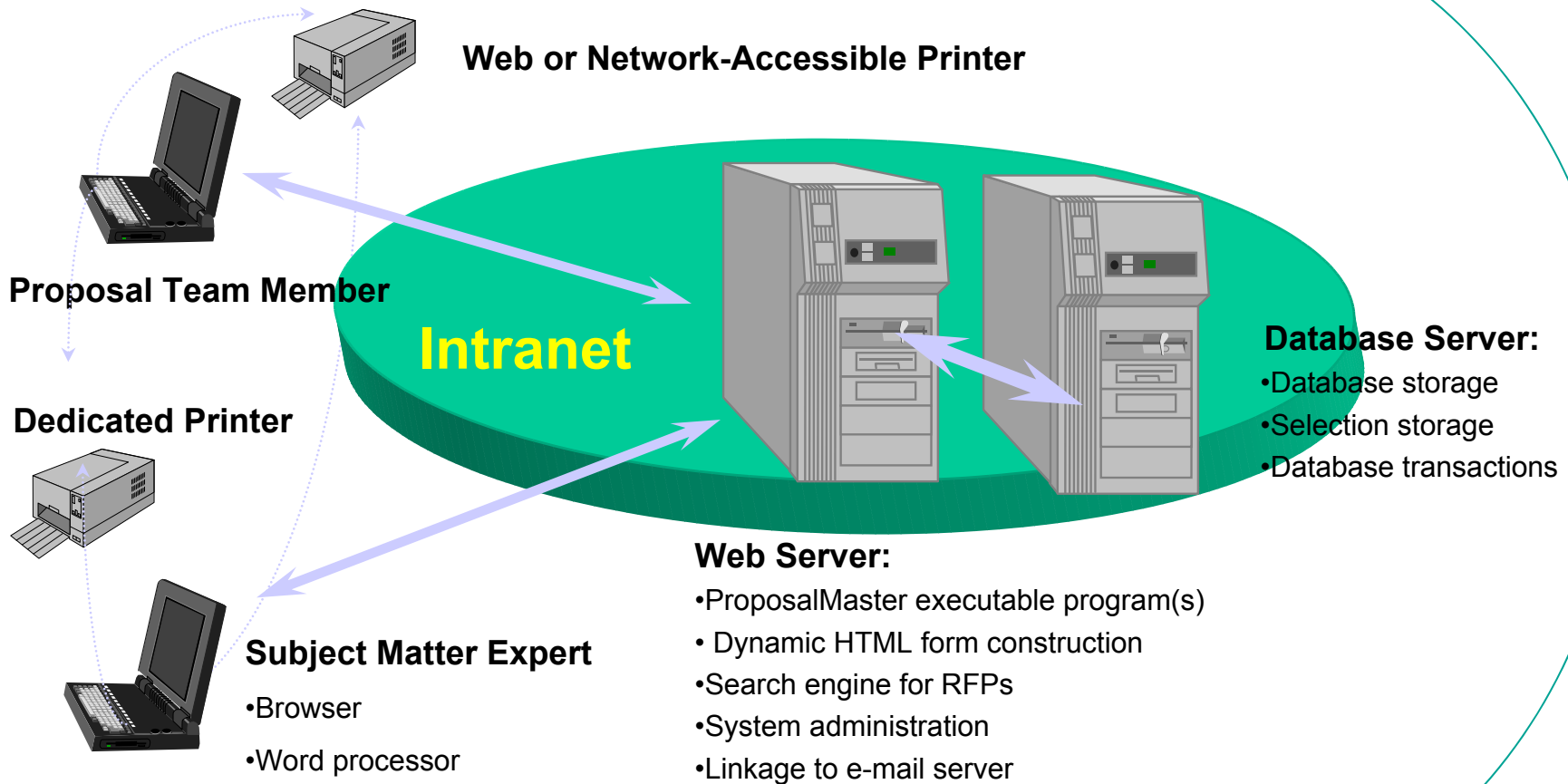
Constraints of the old process

- Currently takes 25 steps
- Difficult to work as a team
- Most tasks are manual other than search/retrieval of possible answers
- Hard to track assignments
- Formatting challenges
- Multiple builds of the document necessary for review and editing
- No workflow, project overview components

Proposal Workflow after Automation circa 2003



Virtual Proposal Teams



What's Next?

Platform extensions

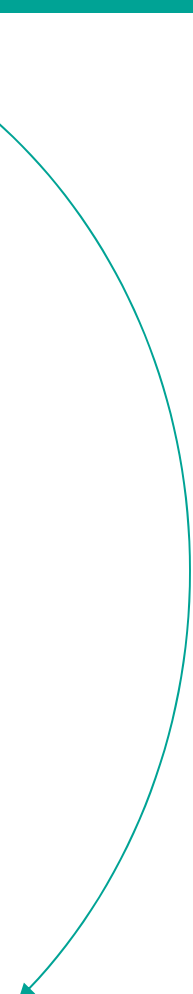
1. Wireless applications
2. Product configuration
3. Information storage and sharing
4. Smart prompts
5. Content configuration

Information management


6. Advanced search/retrieval algorithms
7. N-tiered data stores
8. Document configuration

Analytics

9. Qualification of opportunity—bid/no bid
10. Collaborative filtering
14. Performance metrics
15. Workload monitoring
16. Impact tracking



What about you?

- Innovations you would like to see
 - Technologies that seem promising
 - Application extensions you'd welcome
- 

Finally...

Happy holidays, everyone!

And thanks for inviting me.

