



THE HUNT FOR THE STORY

6 PROVEN WAYS TO GET TECHNICAL CONTENT FROM YOUR SMES

Angie Wolfe, Ideas at Dawn



LEARNING OBJECTIVES

- 1. 6 steps to get content** from your SMEs from resume information to approach
- 2. How to break the ice** and make sure your SME helps you meet your deadline
- 3. 6 questions to ask** your SMEs to get the content you need
- 4. 6 different** interviewing techniques



YOUR TRAINING PROFESSIONAL

ANGIE WOLFE



APMP Foundation and Practitioner
certified professional

Owner of Ideas at Dawn

19 years marketing and proposal management
in civil construction and engineering industry



YOUR TRAINING PROFESSIONAL

ANGIE WOLFE



Started as an intern at a corporate magazine to being a respected leader managing multiple billion-dollar pursuits with several teaming partners

Worked for global companies such as Kiewit, HDR, MWH, and Kraemer North America on all project delivery models from best value to CMGC, design-build to P3





STEP **1**

DO YOUR **HOMework**



*Interviewing is
research as a
social act.*

Rich Maggiani





Gather background information

- Previous written resumes/bios
- Job history
- Project background research
- Read previous relevant go-bys



Read up on existing subject matter material

- Read the RFQ/RFP
- Understand the client's requirements and duties of their role



STEP **2**

PREPARE YOUR INTERVIEW QUESTIONS



Before everything else, getting ready is the secret of success.



Henry Ford

DEVELOPING THE QUESTIONS

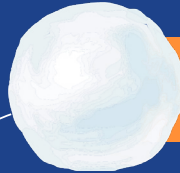


Ideas at Dawn
Marketing Consultants



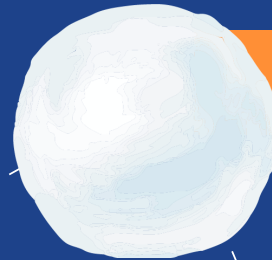
Develop

Develop basic questions



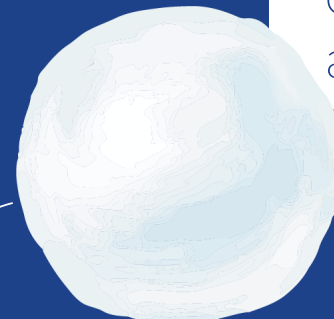
Use

Use the RFQ and RFP as a guide



Write

Write your questions in a way that will uncover unique and strategic capabilities and experiences



Write

Use the interviewing techniques discussed in STEP 4 as a guide





INTERVIEW QUESTIONS TO START FROM



Basics -
who, what,
when,
where, why,
how?



How does
the person
or approach
meet the
goals?



What
makes our
team
special?



What is
unique about
our people,
process,
approach,
activity,
operation, or
methodology?



What
makes us
different
from the
other
proposers?



Do we
perform
faster,
smarter,
cheaper?



STEP **3**

SCHEDULE A MEETING WITH YOUR SME



The more research you do, the more at ease you are in the world you're writing about. It doesn't encumber you; it makes you free.



A.S. Byatt





DO'S OF SETTING THE INTERVIEW

01

Do set a **time limit**



02

Do provide the SME with **background information** on your purpose and goals



03

Do provide **high level topic areas** or the **initial list of questions** in advance



04

Do ask for a **follow-up meeting**





DON'TS OF SETTING THE INTERVIEW

01

Don't think you have to **completely understand** the topic to talk to the SME



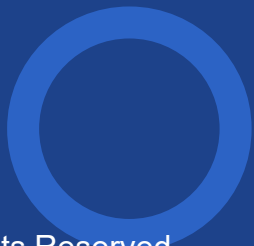
02

Don't be **intimidated**



03

Don't **assume** that all SMEs will be the same





STEP 4

CONDUCTING THE INTERVIEW



When adversity strikes, that's when you have to be the most calm. Take a step back, stay strong, stay grounded and press on.

LL Cool J



BREAKING THE ICE **WITH YOUR SME**

You need to schedule an interview with an SME that is regarded demanding, strong willed, vocal, and an industry veteran

This person is definitely “old school” and still believes that projects are won and lost on the bid

A proposal is just a necessary hoop the firm jumps through to make the client happy



BREAKING THE ICE WITH YOUR SME

As the proposal writer, **you must:**



Disarm the SME from the start



Clearly define the expectation



Explain why this is important to the bid



Gain their trust



Appreciate what this SME does



Be efficient with their time





DO'S OF THE THE INTERVIEW

01

Record the interview
(if you have permission)



02

Start on time and **begin with small talk**



03

Practice active listening **and take notes**



04

Ask if you don't understand



05

Stay on track and use your outlines



06

Thank your SME and discuss next steps





1. Spatial

Discrete project areas

2. Chronological

Schedule
Operational sequence

3. Broad to specific

Executive summary
Cover letter

4. Most important to least important

Technical approach

5. Who, what, when, where, why, how

Management approach
Project descriptions

6. Method with supporting evidence

Technical approach

6 INTERVIEWING APPROACHES



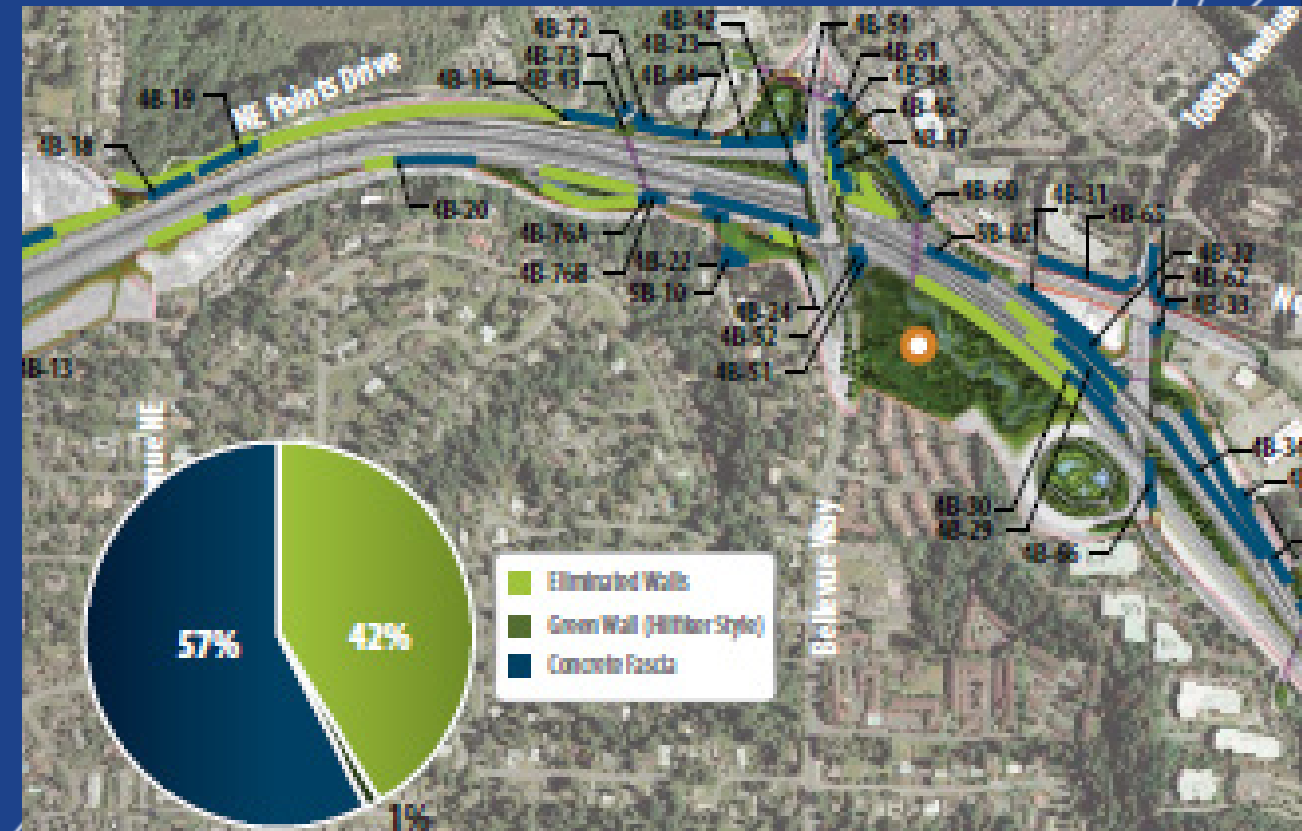
1. HOW TO WRITE SPATIALLY

Technique: Spatially

When to Use

Discrete project areas that contain multiple activities

The Basic Configuration included over 450,000 square feet of exposed retaining wall surface. In refining these plans, we removed more than 42% of this exposed face, a 190,000 square feet reduction in the amount of concrete wall in the corridor. Figure 4.3 illustrates wall facia types and surface treatments in addition to walls we have replaced with vegetated slopes. These figures, above anything else, demonstrate our support of the Green over Gray theme.





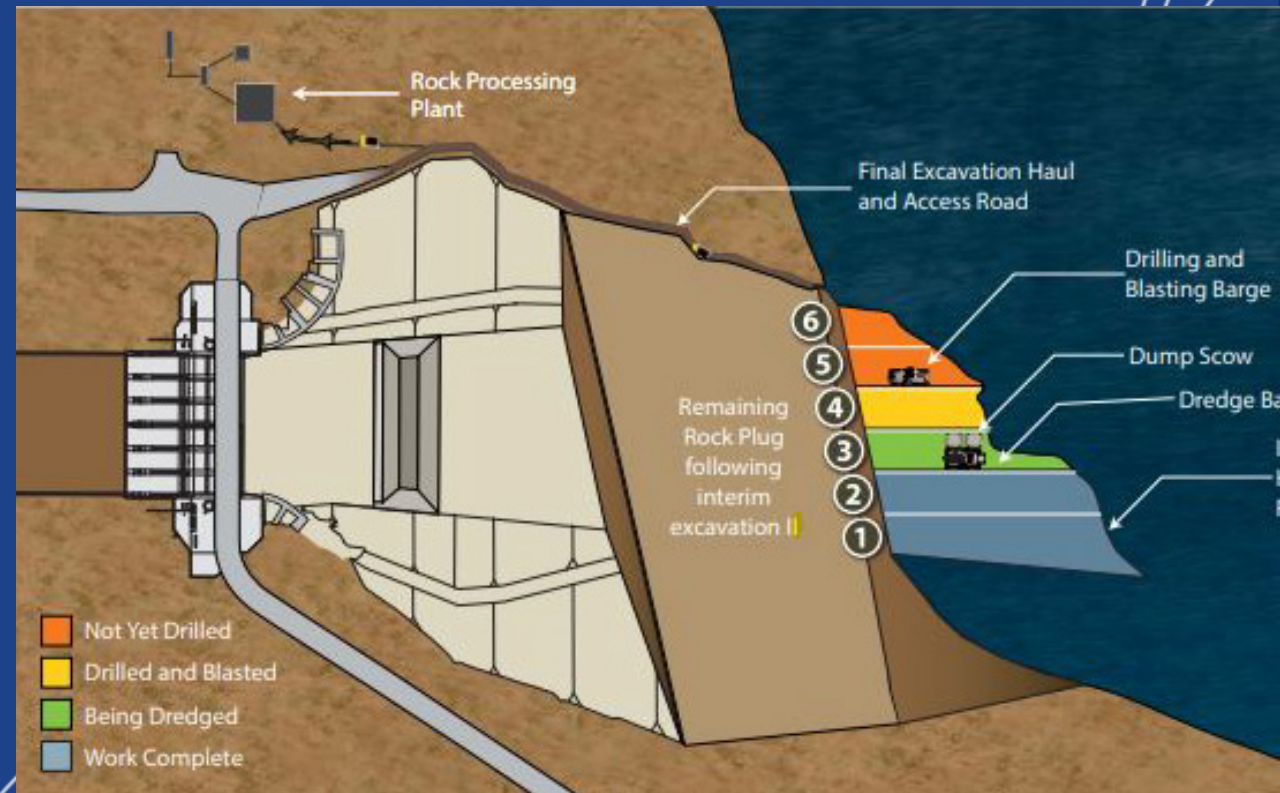
2. HOW TO WRITE CHRONOLOGICALLY

Technique: Chronologically

When to Use

Schedule narrative, technical approach, operational sequence

We have devised a sequence that allows for concurrent activity for drilling and blasting as well as dredging operations. We have divided the Approach Channel into six zones as shown in Figure 31 to better control the flow of work. We will work sequentially excavating and cleaning blasted areas from one side of the channel to the other to avoid contaminating previously excavated areas. These barges will maintain a minimum of one zone of separation between them during their respective operations. The drilling and blasting barge will begin working in Zone 1 moving from left to right. Once the drilling and blasting barge enters into Zone 3, the dredging barge will...





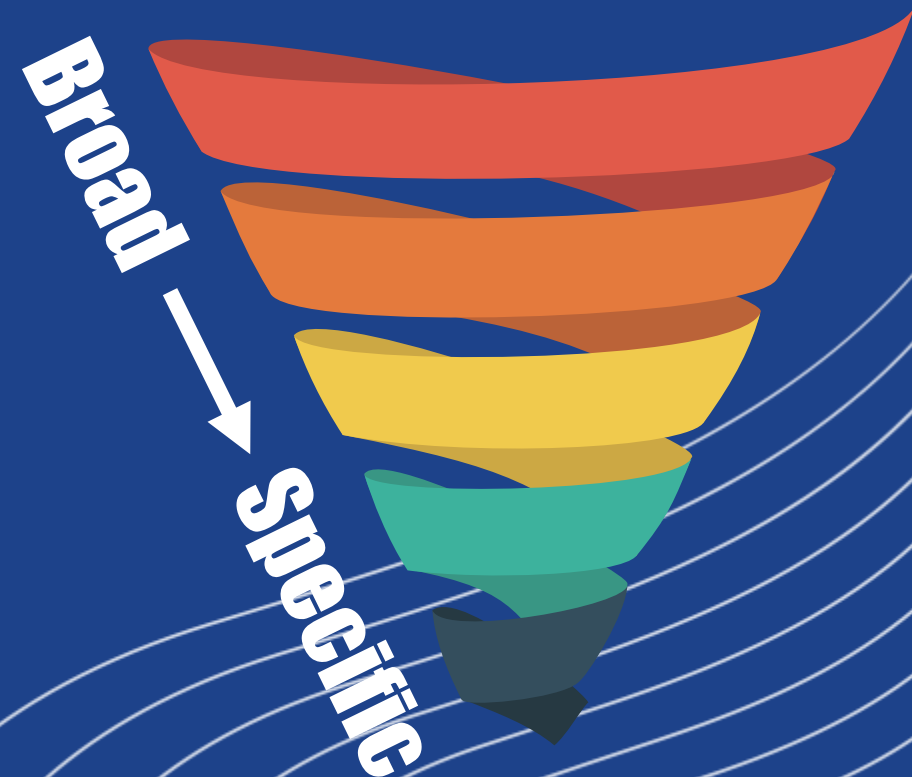
3. HOW TO WRITE BROAD TO SPECIFIC

Technique: Broad to Specific

The basis of our approach for MOT phasing is to isolate areas and create a free-flowing work space for personnel, equipment and materials. This condition greatly reduces impacts to the traveling public, while promoting a safe travel environment for motorists and a safe work zone for our crew. An additional feature of this approach is efficiency. Our proposed method of handling traffic expedites the work as quickly as possible while maintaining driver familiarity.

When to Use

Executive summary, cover letter





4. HOW TO WRITE MOST IMPORTANT TO LEAST IMPORTANT

Technique: Get the attention of your reader and keep them while you outline your plan of approach.

When to Use

Technical approach

We recognize the importance of completing this project ahead of schedule and have developed a plan to provide capacity completion by Thanksgiving 2013, more than one full year ahead of the mandatory completion date. The road user cost evaluation promotes the acceleration of construction. Our plan is to completely open all lanes of traffic in the six-lane configuration by Thanksgiving 2013, returning in the spring of 2014 to complete the final SMA surfacing work by July 4, 2014. This provides for a faster, ultimate use resulting in reduced impacts to travelers and alleviating corridor congestion.

Descending Outline

Conclusions and Recommendations

Most Important Detail

Least Important Detail

Discussion

Appendices

Order of Your Message





5. HOW TO WRITE WHO, WHAT, WHERE, WHEN, WHY, HOW

Technique: Provides all important details in a short and concise statement. No fluff needed.

When to Use

Project descriptions, management approach

This Contractor-led joint venture is developing, designing and reconstructing \$1 billion of roadway improvements under a Comprehensive Development Agreement. The project includes State Highways 114 and 121 and adjacent roadways located north of DFW Airport. The improvements will enhance mobility and air quality through expanded roadway capacity, toll managed lanes and continuous frontage roads. Nearing 85% complete, this massive project is set to finish over a year ahead of schedule





6. HOW TO WRITE METHOD WITH SUPPORTING EVIDENCE

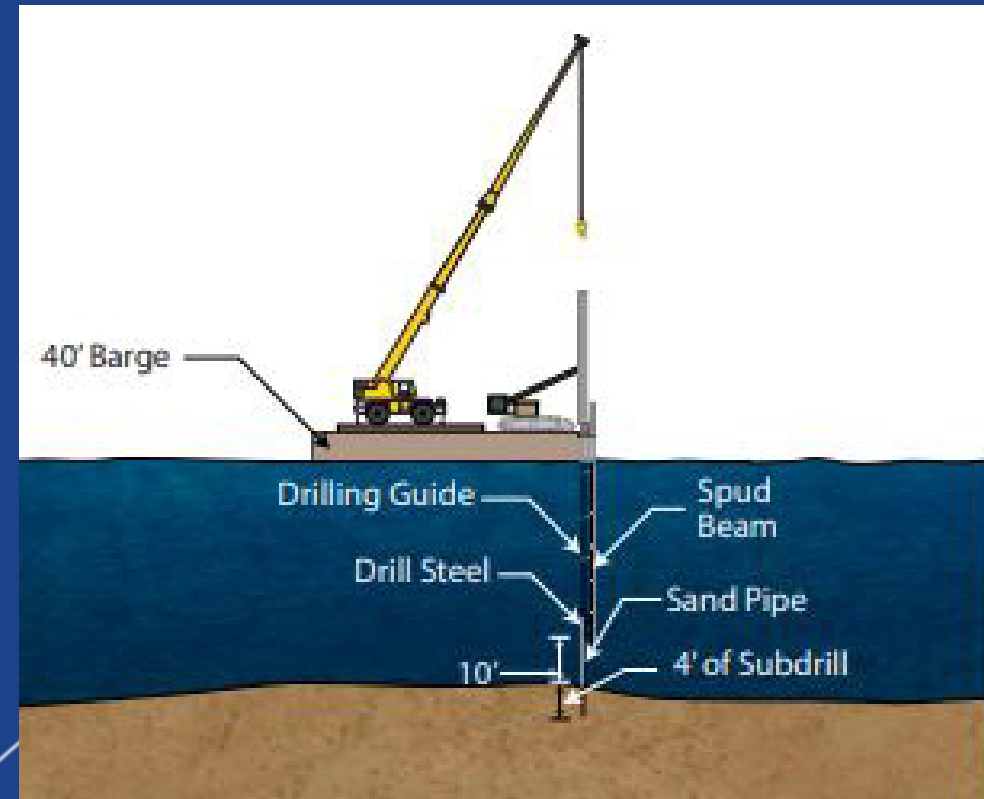
Technique: Provide the experience details necessary to align your background to align with their needs.

Our typical in-the-wet loading sequence begins with three drills working on one side of the drilling barge to drill blast holes. The drilling frame template will contain pockets that allow the spud beam to slide vertically through each pocket. Each spud beam will have several drilling guides bolted on the side. At the end of each spud beam we may weld a 10-ft.-long, 6-in. steel pipe to serve as a sand pipe.

We will assign drills to the number of pockets available based on the time it takes to drill to the required depth quantity. Our approach offers the most logical usage of the drill template and drill rigs on the barge.

When to Use

Technical approach





Which technique do you use the most?

For which **sections**?

Resumes vs. **Projects** vs. **Approach**



STEP **5**

FOLLOW UP
TO FILL IN THE GAPS



*Coming together
is a beginning;
keeping together
is progress;
working together
is success.*

**Edward
Everett Hale**



2ND ROUND OF INTERVIEWING

After you've written your initial content
but **before red team**

Fill in data gaps

Support and strengthen the win themes
– keep asking why

Gather additional detail including the graphics
and proofs of doing the work

Clarify conflicting information

Validate the accuracy of our design, estimate,
and schedule



PINK TEAM

RED TEAM

GOLD TEAM

SUBMISSION



STEP 6

REVIEW YOUR DRAFT AND FINE-TUNE



Writing the perfect paper is a lot like a military operation. It takes discipline, foresight, research, strategy, and, if done right, ends in total victory.

RYAN HOLIDAY



LAST ROUND OF INTERVIEWING

After red or gold team reviews

Fill in data gaps

Support and strengthen the win themes
– keep asking why

Update details including graphics, project call-outs, etc.

Clarify conflicting information

Validate the accuracy of our design, estimate,
and schedule



PINK TEAM

RED TEAM

GOLD TEAM

SUBMISSION



SUMMARY



6 PROVEN WAYS TO GET TECHNICAL CONTENT FROM YOUR SMES





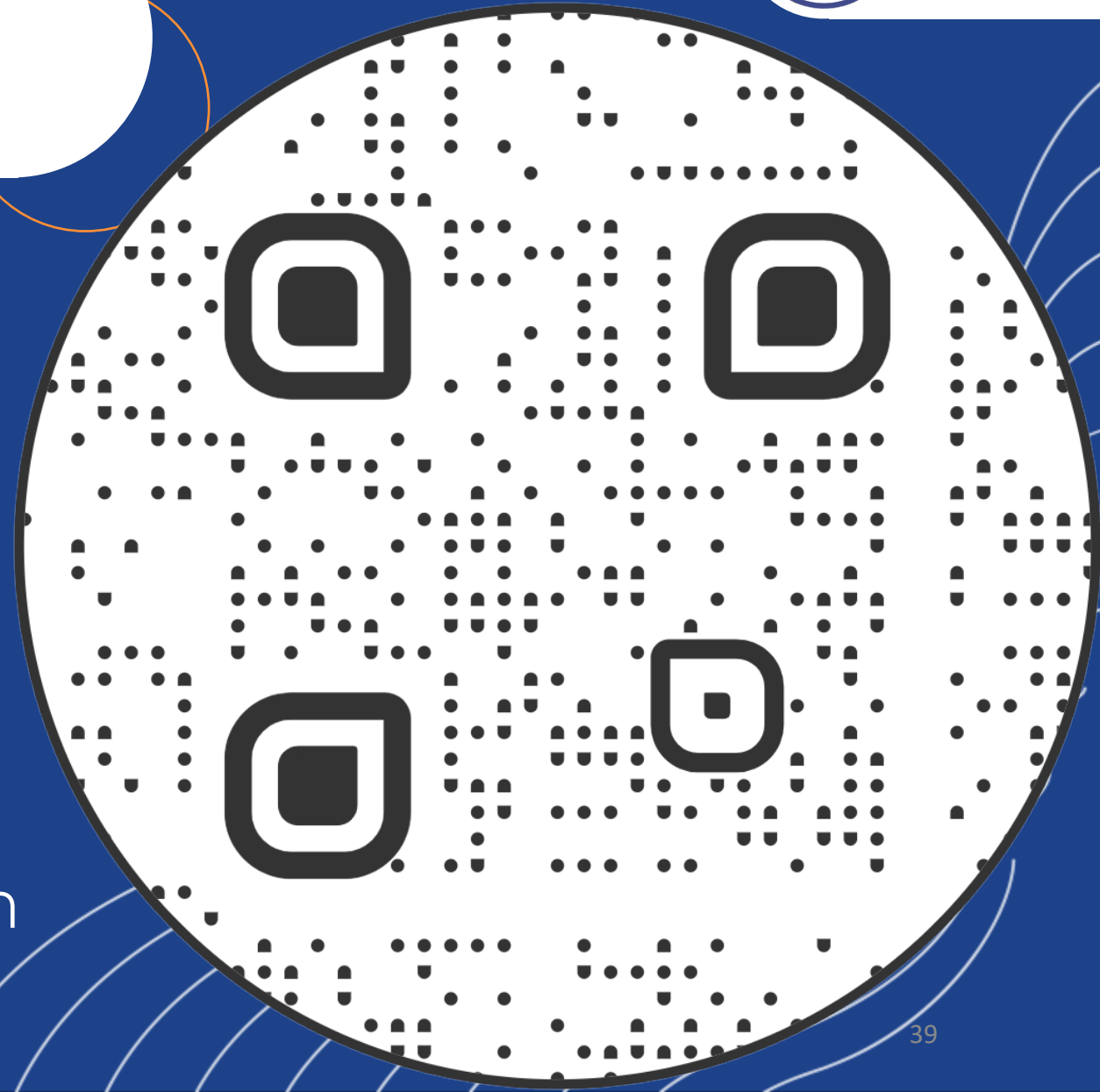
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QUESTIONS?