

# 90-Day Start-Up Plan | Hit the Ground Running

weeks

1-3

## Gain situational awareness

- **Meet with direct reports** individually to understand current roles, responsibilities, workload, career goals, and opinions for the future of pursuits
- **Meet with key pursuit leaders and contributors** to understand current processes that are working, those that need improvement, and overall opinions/desires for the future of pursuits
- **Meet with management champion/sponsor** to identify goals for the team
- **Host team retreat** to build camaraderie, set goals, and develop plan to reach goals
- **Learn the business** by reviewing business plans and meeting with business leaders to understand key business areas, initiatives, clients, projects, discriminators/selling points, and upcoming pursuits
- **Evaluate efficiency and effectiveness** of current reference library, interaction with regional staff, and pursuit tracking and reporting
- **Establish team communication** through weekly team meetings and business development/pipeline meetings; monthly check-ins and lunches; and team reports to leadership

weeks

4-6

## Develop new standard procedures

- **Develop flexible pursuit protocol** that includes a checklist of key steps that should be taken for each pursuit, indicating the person responsible
- **Develop procedure for tracking opportunities** and assign a champion
- **Develop tailored training** that provides step-by-step instructions on how the group will approach pursuits going forward
- **Meet with key division managers** to develop list of upcoming strategic pursuits and begin prioritizing
- **Establish goals for each pursuit** (i.e., write a killer cover letter or draft capture plan for key client)
- **Lead pursuit(s) from start to finish** with direct reports shadowing the process
- **Develop comprehensive internal brochure** on the business that provides information on each division, including key discriminators/selling points, clients, projects, and people
- **Establish formal job responsibilities** of direct reports to align with new pursuit process

weeks

7-9

## Train pursuit participants

- **Host leadership meeting to establish the *new normal*** and support/reinforce importance of training and new processes
- **Offer multiple training opportunities for staff to participate**
- **Visit key regional offices** to deliver training and build collaborative relationships with staff
- **Direct reports to begin leading pursuits** following the new process
- **Serve as key point of contact** and log all questions, comments, challenges, or concerns

weeks

10-12

## Evaluate feedback

- **Review feedback from training and first weeks of implementation** to evaluate lessons learned and any suggested modifications
- **Meet with key pursuit leaders and contributors** to evaluate effectiveness and suggested modifications
- **Discuss feedback with leadership** and make any needed modifications
- **Present at leadership meeting on adoption of process** and celebrate successes

## Ongoing

- **Meet regularly with key pursuit leaders and contributors**
- **Update leadership at monthly meetings on progress, pain points, and successes**
- **Host quarterly training sessions for new hires**
- **Promote open team communication**
- **Document lessons learned and revisit process to best fit the needs of the organization**

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By implementing new processes and procedures that are continually adjusted based on feedback, we can more efficiently and effectively prepare higher quality proposals...and win more work!

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# Proposal Manager Checklist

## Plan the Proposal

- Capture manager completes Opportunity Form and Go/No-Go Form (proposal manager schedules Go/No-Go Meeting if necessary)
- Include pursuit on Opportunities Tracker
- Set up B&P number, distribute to pursuit team
- Establish pursuit folder on DFS
- Dissect RFP into proposal management plan (include detailed schedule)
- Schedule and lead kickoff meeting (always have a kickoff!)
- Develop at least three win themes (unique features, benefits, proofs)
- Assign authors for each section
- Distribute action items and schedule all check-ins and review meetings on calendar

## Write the Proposal

- Finalize win themes
- Write first draft of cover letter and/or executive summary
- Tailor project descriptions and resumes to opportunity
- Remove irrelevant boilerplate
- Incorporate graphics, call out boxes, and quotes
- Include action captions for every graphic/table
- Edit entire document (active voice, first person, style guide)

## Review the Proposal

- Lead pink team review at least two weeks ahead of due date (if applicable) (include HF)
- Lead red team review one week ahead of due date (always have a red team review!) (include HF)
- Bring in outside reviewers to evaluate
- Distribute action items following every review

## Submit the Proposal

- Conduct final gold team review at least one day ahead of printing (include HF)
- Debrief internally
- WIN!**
- Debrief with client (win or lose)
- Celebrate success!