



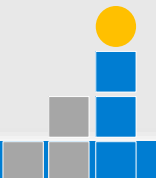
Paying Attention to Best Practice – the Surest Way to Proposal Success

Presented by
Nancy Kessler and Howard Nutt
APMP Midwest Chapter Conference
19 September 2018



“The entry is wide and the road is easy that leads to ruin, and many travel that way. But the entry is narrow and the way is hard that leads to success, and only a few find it...”

Paraphrased from
Jesus of Nazareth, circa 28 C.E.

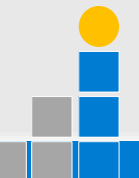


Presentation Roadmap

5 benchmarks to help you keep your proposals
“on the straight and narrow”



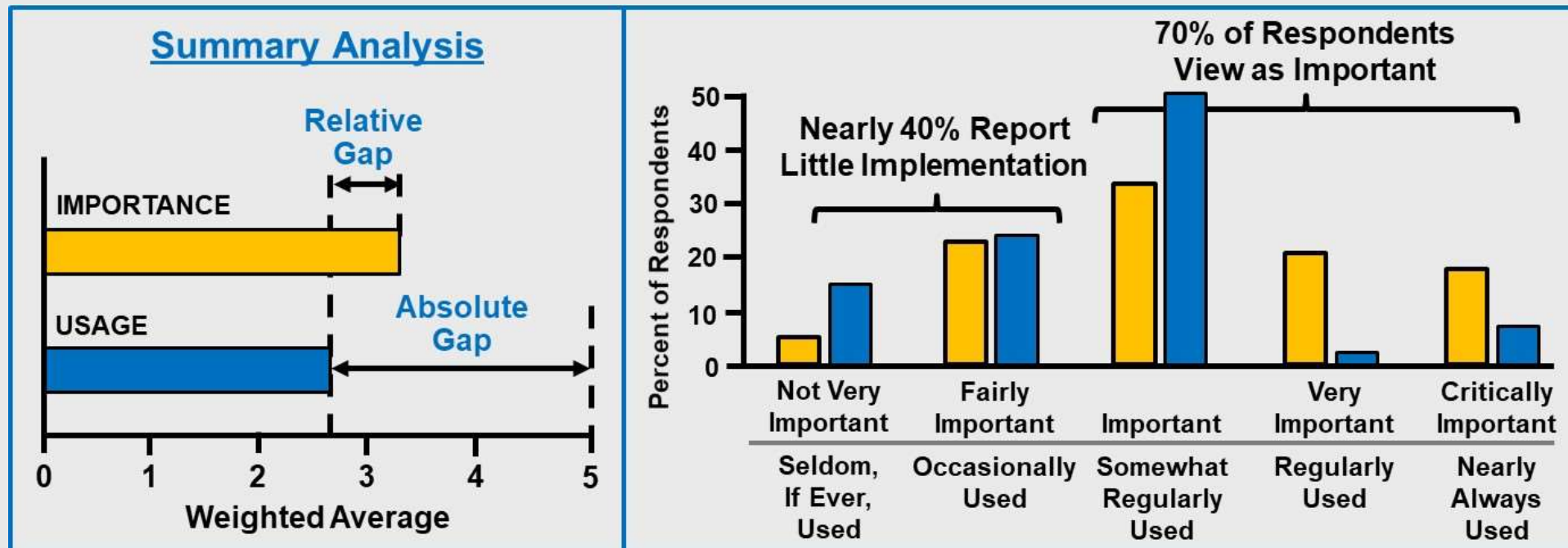
THIS OR THIS?



Validated Proposal Readiness

The cross-roads:

- Broad Street: “This opportunity is a perfect fit for us. We can’t lose...”
- Narrow Path: “Benchmarking tells us to validate that our offering and other baselines are ready to propose”



Proposal Readiness Checklist

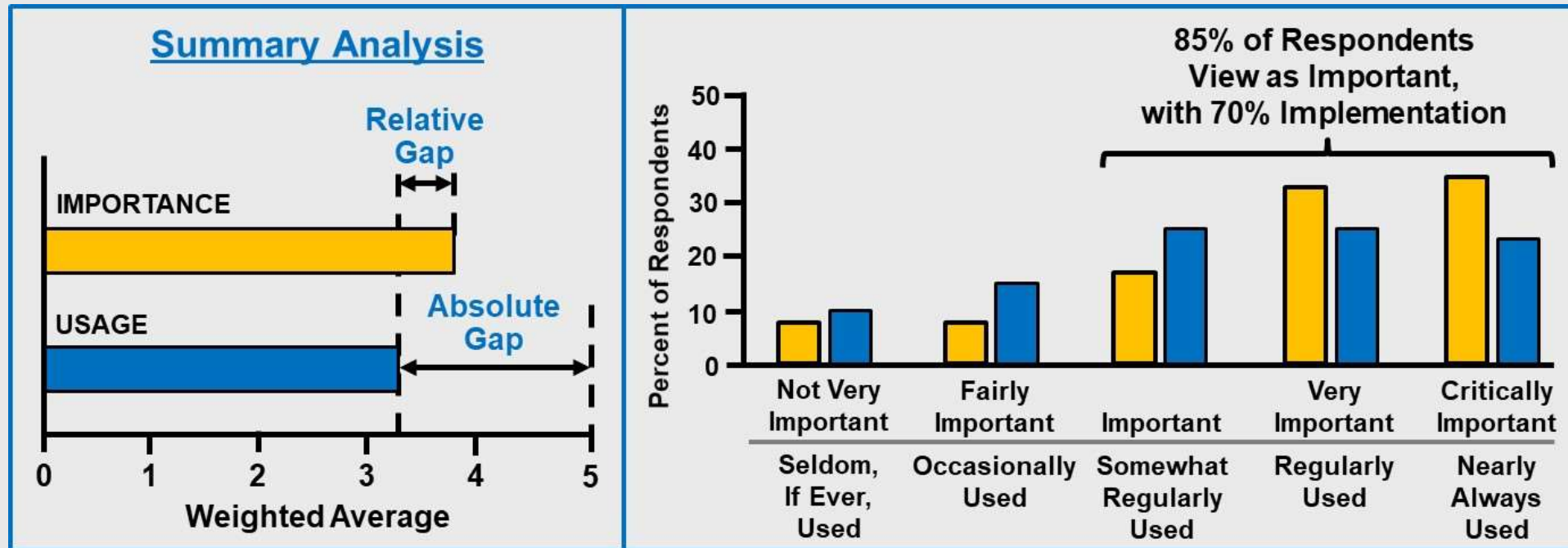
Customer Intimacy	Competitor Knowledge
<ul style="list-style-type: none">• How strong is our relationship?• Have we shaped requirements?• Do we know their “hot buttons”?• Have they validated our basic approach?	<ul style="list-style-type: none">• Who are our competitors?• What is their relationship with the customer?• What are they offering?• How could they beat us?
Offering Maturity	Programmatic Viability
<ul style="list-style-type: none">• Can we meet requirements?• Do we meet risk parameters?• Do we need development beyond program scope?• Do we offer winning value-for-cost?	<ul style="list-style-type: none">• Can we meet the customer’s budget target?• Are there any contract/other “red flags”?• Is our program team defined?• Is our management “on board”?



Fully Defined Kickoff Package

The cross-roads:

- Broad Street: “We need to start writing immediately...”
- Narrow Path: “Benchmarking tells us success depends on solid planning – up to 25% of response timeframe!”



Proposal Kickoff Checklist

1. Proposal Project Summary
2. Customer Profile
3. Competitive Analysis
4. Proposal Strategy and Themes
5. Staffing, Roles and Responsibilities

**Key Information
from Capture Plan**

Attachment 1. Response Development Schedule

Attachment 2. Writers' Information and Guidance

- Individual writers packages with partially completed storyboards with specific guidance

Attachment 3. Draft Executive Summary

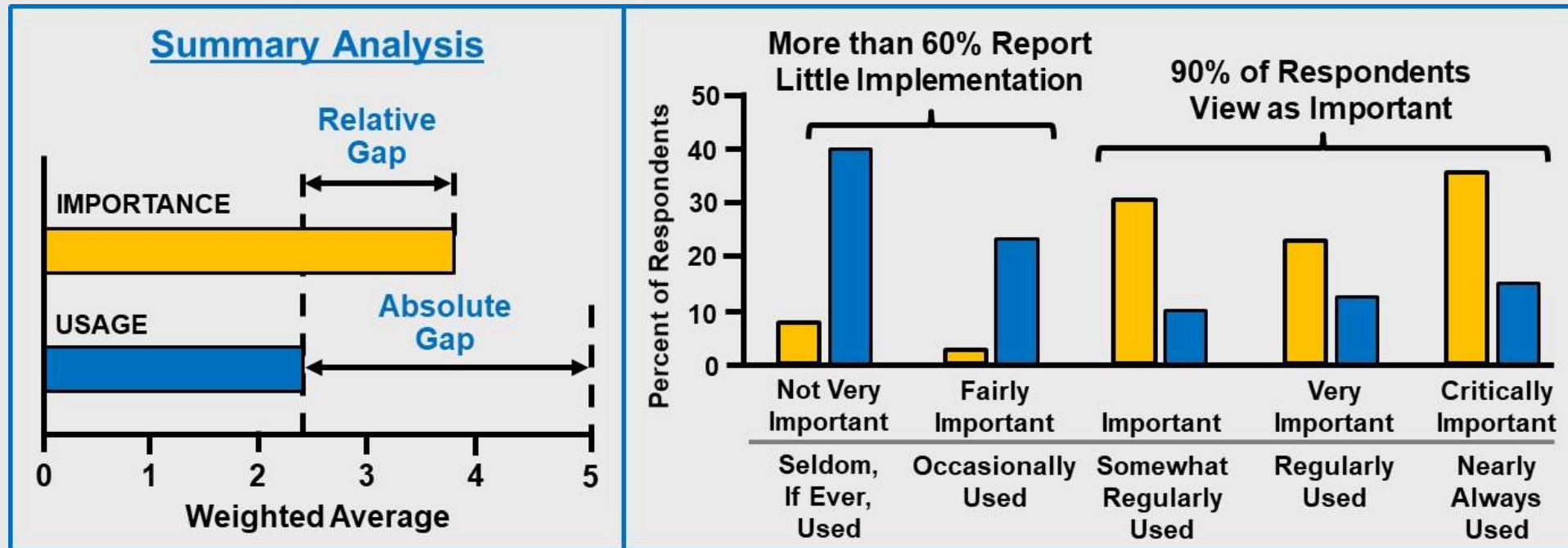
**What Distinguishes
Top Performers!**



Team Training and Preparation

The cross-roads:

- Broad Street: “Our engineers know how to write...”
- Narrow Path: “Benchmarking tells us to follow a process that assures compliance and customer focus”



Proven Training Strategies

- Integrated Competency Development
 - Comprehensive training program based on a broad BD competency framework
 - Differentiated training based on BD functional roles
- Targeted Individual Training
 - Proposal-oriented workshops at set intervals
 - Participation of selected proposal contributors based on the proposal forecast
- In-Process Team Workshops (JIT)
 - 10-15 modules, each requiring 10-20 minutes
 - Standalone or used to reinforce other training

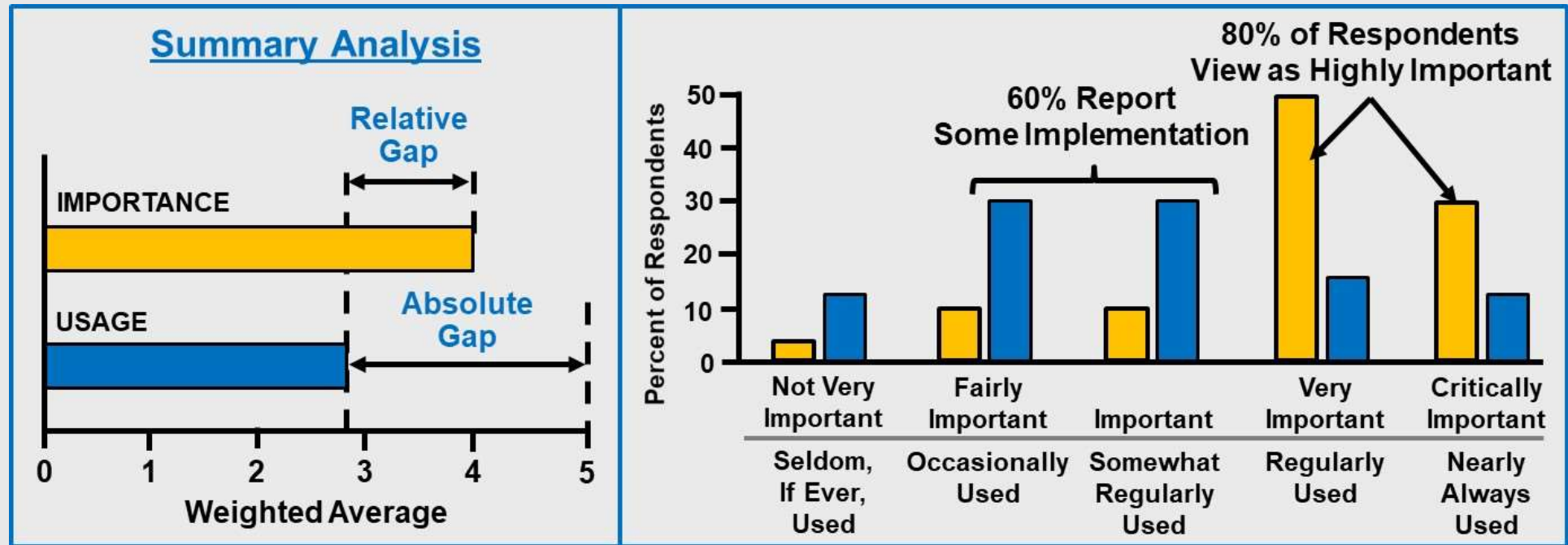


Proposal Quality Standard

The cross-roads:

- Broad Street: “Proposal content is all that matters...”
- Narrow Path: “Benchmarking tells us that there are defined characteristics of a winning proposal”

EXAMPLE: STRATEGIC
USE OF THEMES



Quality Management Checklist



Buyer Industry: Education
 Seller Industry: Computing, IT and Telecoms

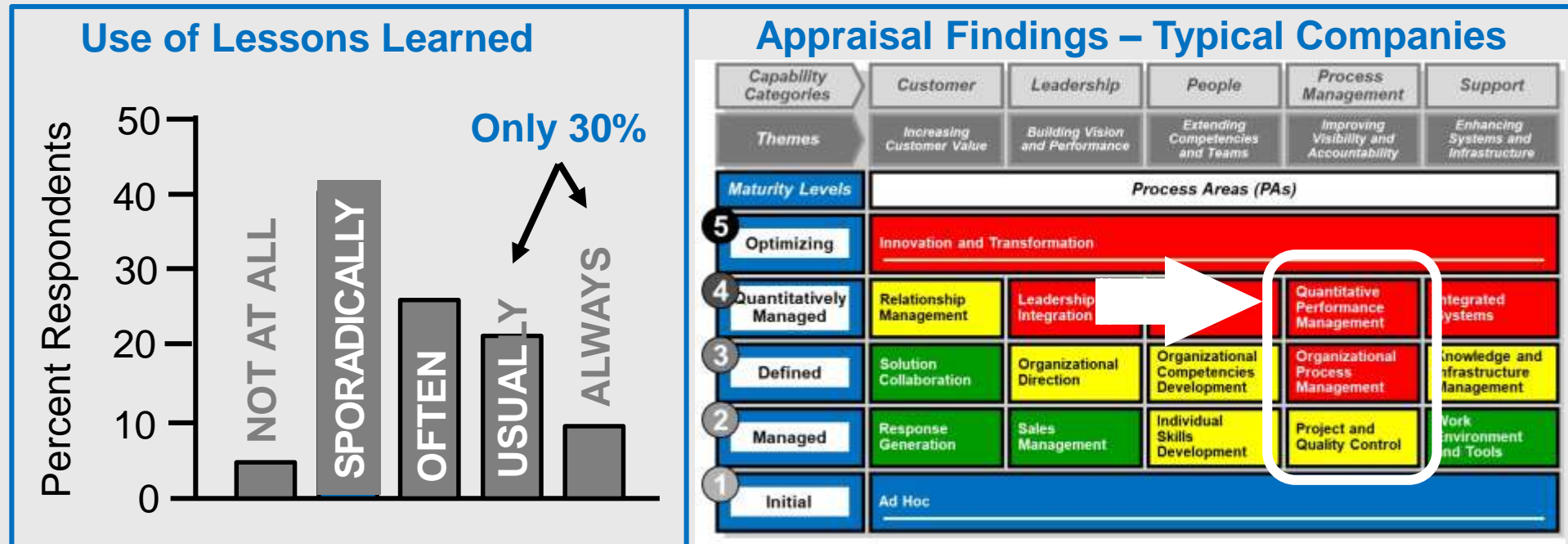
Category	Your Proposal	All Sector Average
Compliance	6.1	7.6
Responsiveness	7.2	8.0
Strategic Focus	7.8	8.1
Competitive Focus	6.7	7.8
Quality of Writing	7.8	7.8
Visualisation	7.2	7.6
Document Design	6.7	6.7

BidBench^{SOLO}
www.bidbenchsolo.co.uk/bidbenchsolo.aspx
 By Shipley Limited, Yeovil, Somerset, UK

Disciplined Lessons Learned Program

The cross-roads

- Broad Street: “Selling is an art. No two are alike...”
- Narrow Path: “Benchmarking tells us that predictable results come from managing and improving process”

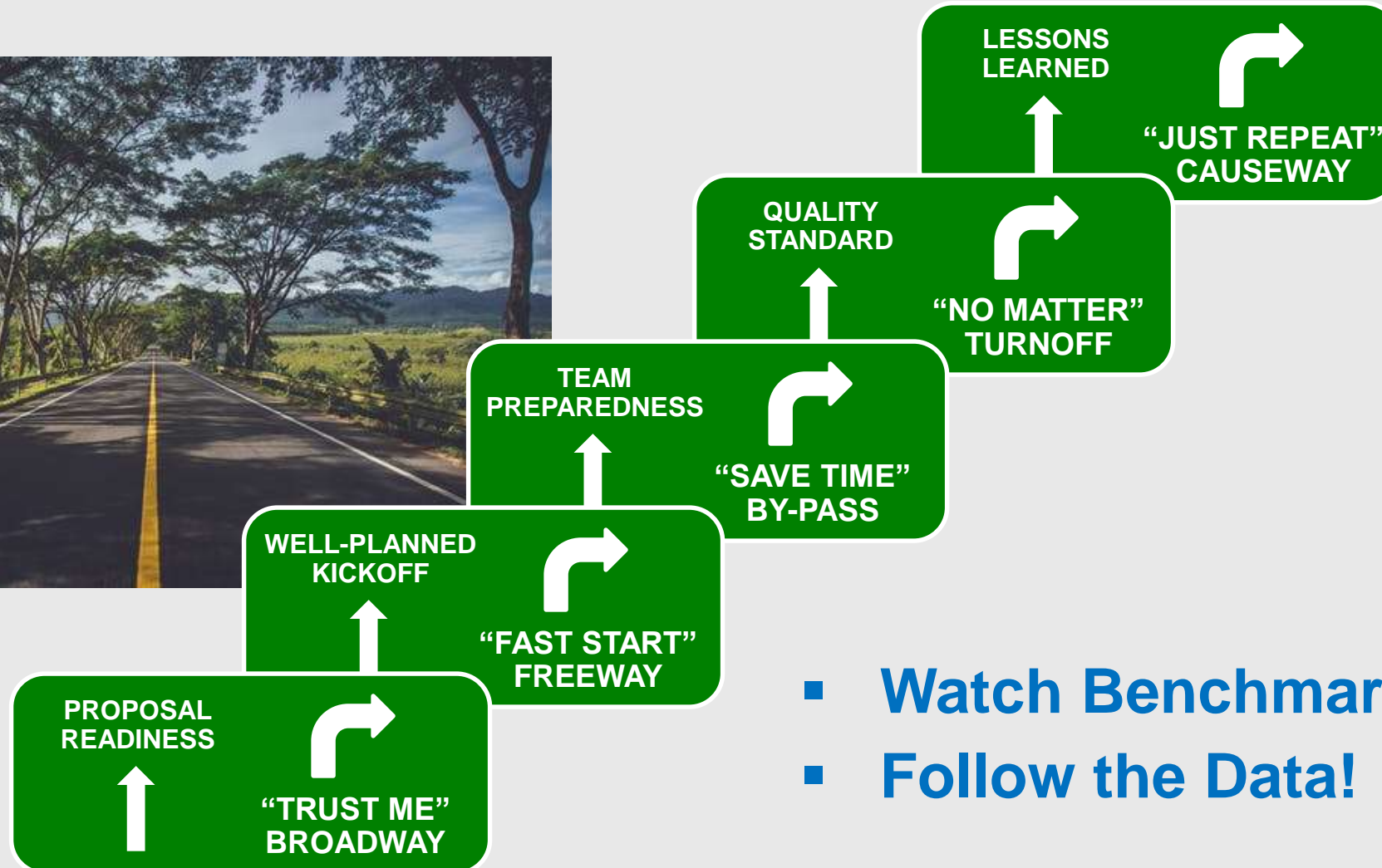


Systematic Improvement Planning

- Feedback from proposal teams
 - Typically, online survey routinely given to all teams
 - Standard questionnaire, tailored as appropriate
- In-process metrics to identify problems
 - Spend profiles by functional groups
 - Targeted proposal steps, including review performance
- Formal program to analyze, vet, implement, and review improvements
 - Trends from ongoing proposal team feedback, plus formal “lessons learned” from strategic proposals
 - Compiled into annual review with senior leadership team



Following the Benchmarks as “Guideposts”



- Watch Benchmarks!
- Follow the Data!

Building Key Data Sets

- Proposal Readiness
 - Data correlation to critical success factors
- Fully Defined Kickoff Meeting Package
 - Data correlation to process efficiency
- Team Preparedness
 - Data input to ongoing training and competency programs
- Proposal Quality Compliance
- Data correlation to customer feedback
 - Lessons Learned Program
 - Data aggregation to prioritize process improvements

**What Sustains
Top Performance!**

Conclusion

- Improved win rates by 40-50%
 - Direct correlation to proposal readiness criteria for total population
- Higher capture ratios of 2X and above
 - Direct correlation to proposal readiness criteria for strategic pursuits
- ***But most importantly – take control of your proposal journey!***
 - ***Reduce compliance and responsiveness issues***
 - ***Grow proposal productivity up to 35%***
 - ***Improve professionalism and reduce burn-out***

