



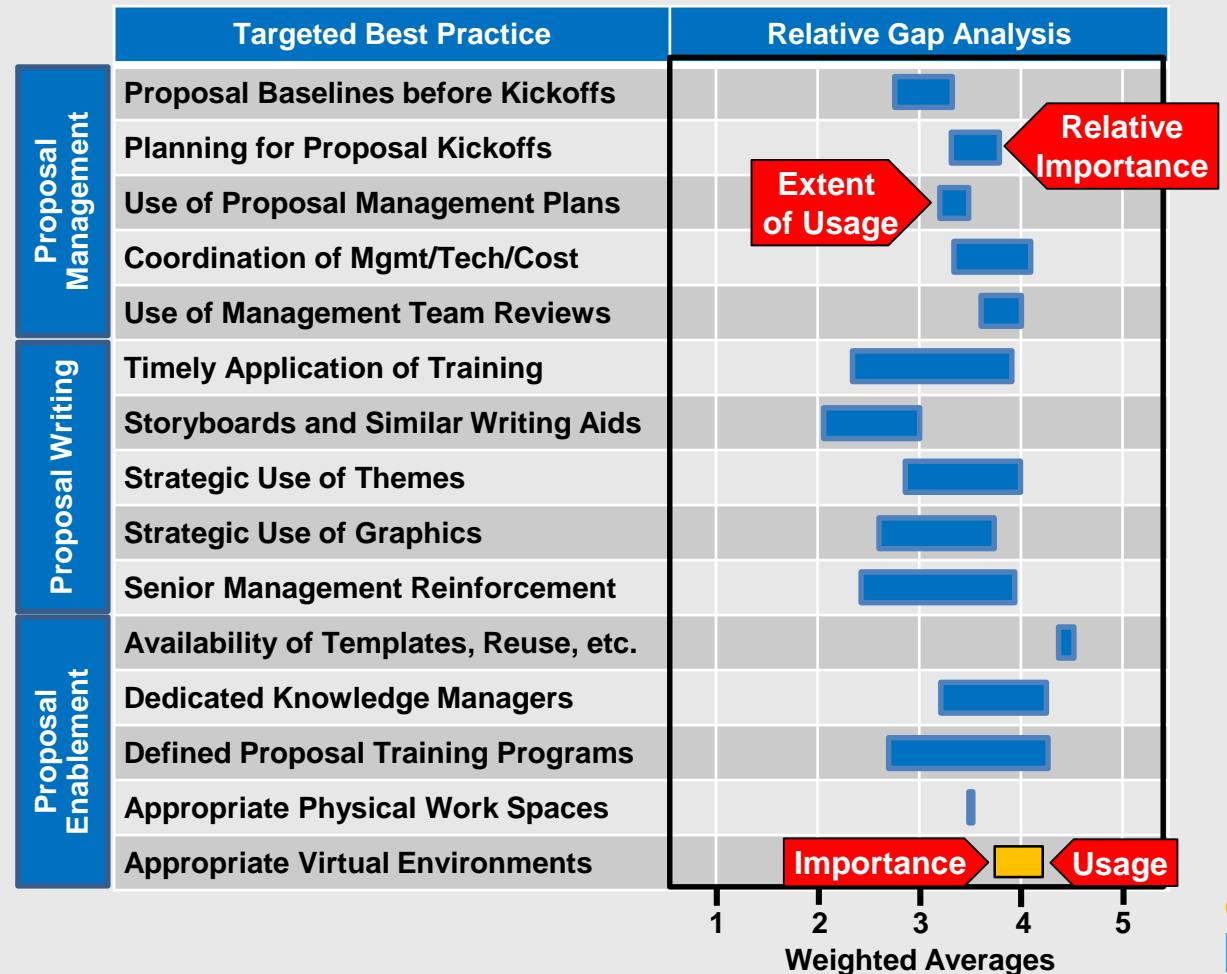
Proposal Best Practices – Importance versus Actual Usage

A Research Study Report
Presented to
APMP Greater Midwest Chapter
19 September 2018



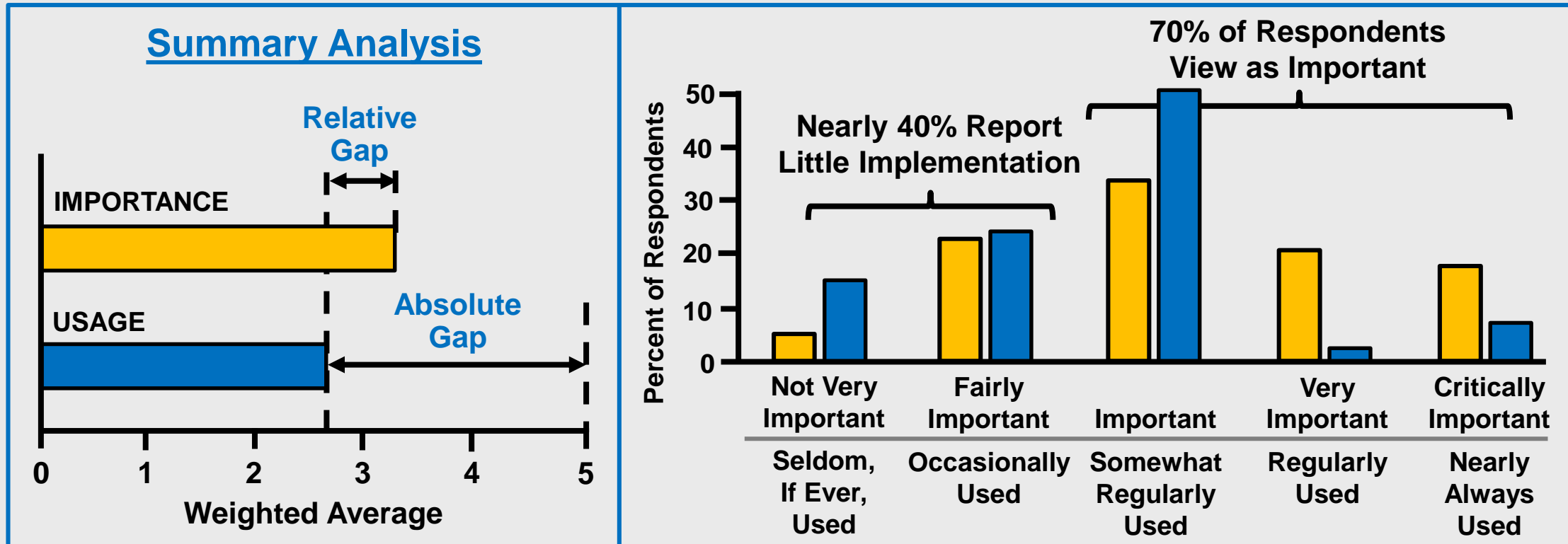
Findings Summary

- Study of 15 recognized proposal best practices
 - ➔ Feedback on importance to proposal success
 - ➔ Self-assessment of respondents' actual usage
- Data from 43 APMP members
 - ➔ All part of Greater Midwest Chapter
- Survey performed during 3Q2018
 - ➔ Data collection closed on 7 Sept 2018



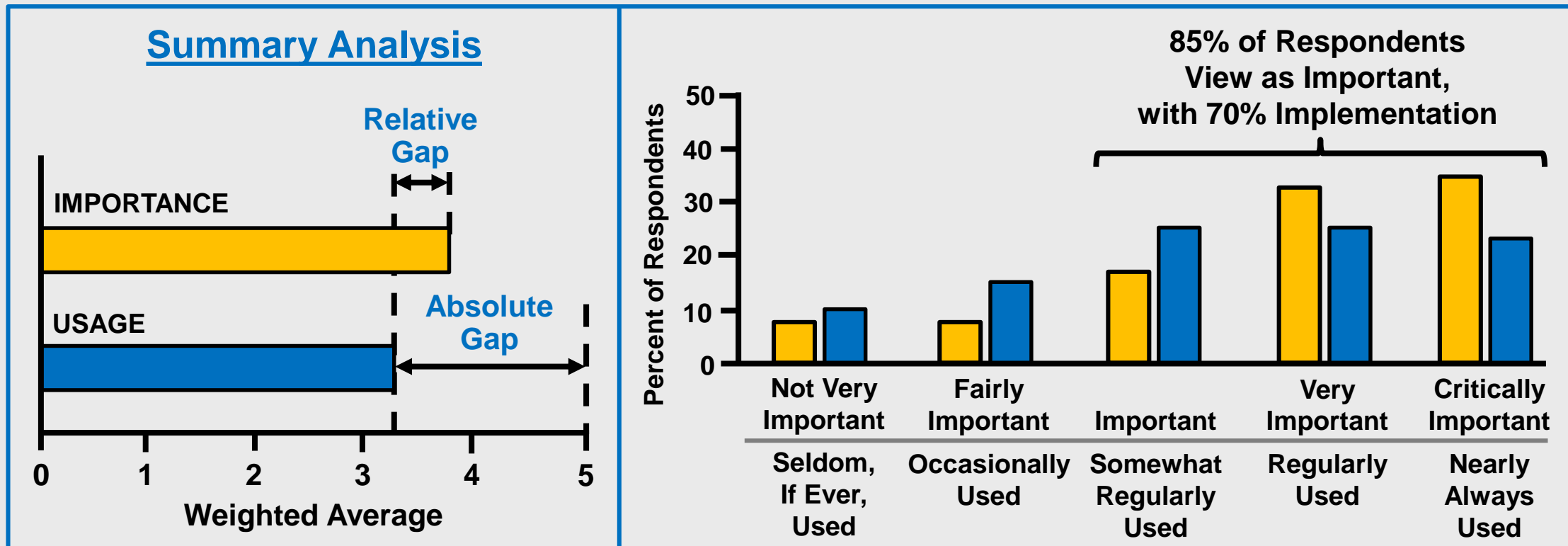
PROPOSAL MANAGEMENT: Proposal Baselines before Kickoff Meeting

- Issue is solution readiness to begin proposal preparation
- 50 percent of respondents report “somewhat regular” implementation



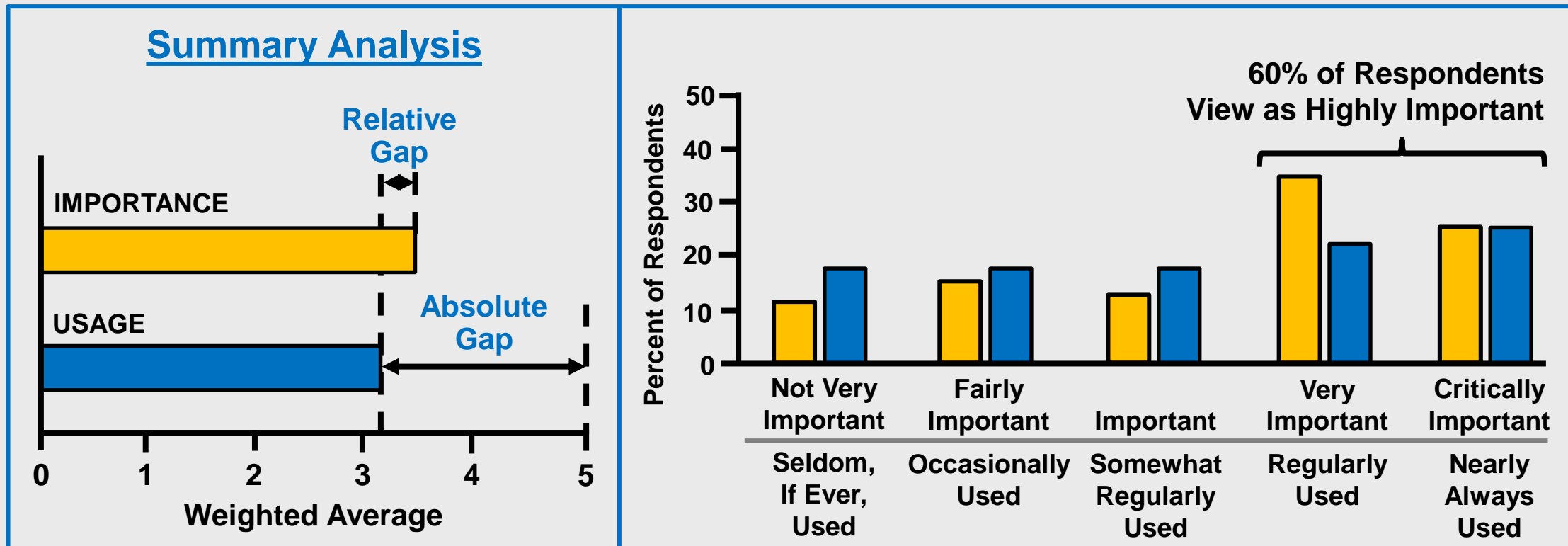
PROPOSAL MANAGEMENT: Proposal Manager Planning for Kickoff Meetings

- Issue is having a mature proposal plan before engaging proposal team
- Only modest gap reported between importance and implementation



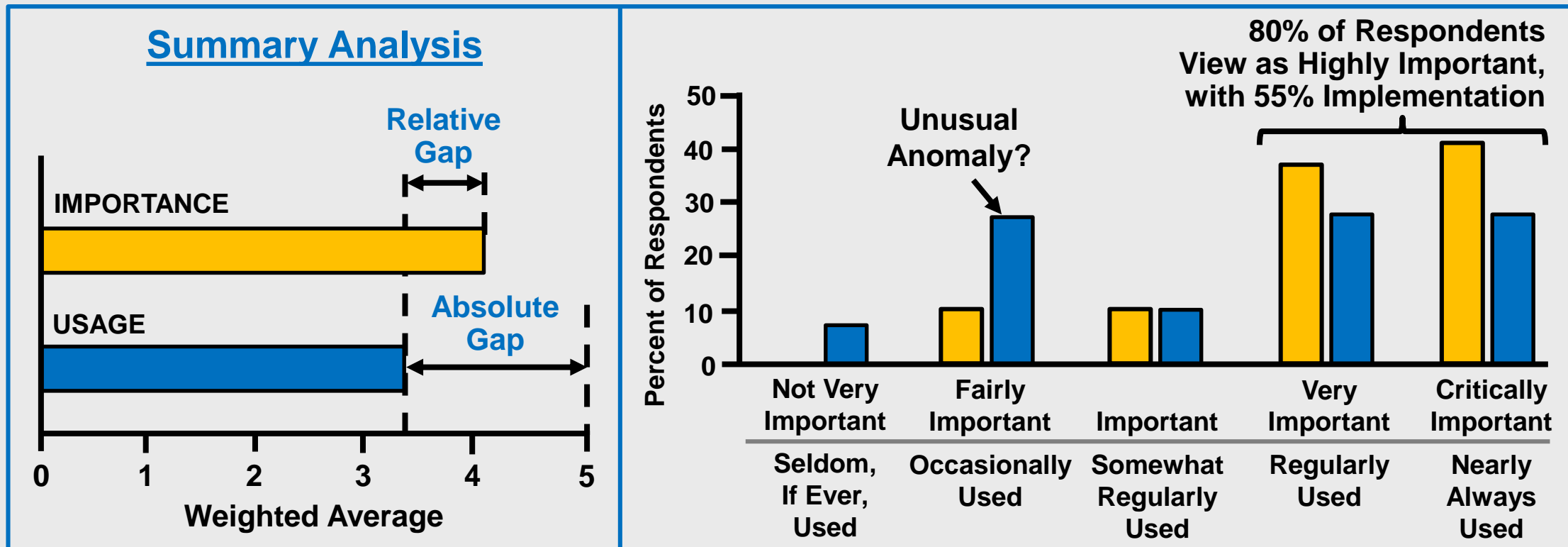
PROPOSAL MANAGEMENT: Use of Proposal Management Plans

- Issue is assuring ability to lead the proposal team through disciplined process
- Uneven recognition of the importance of detailed planning



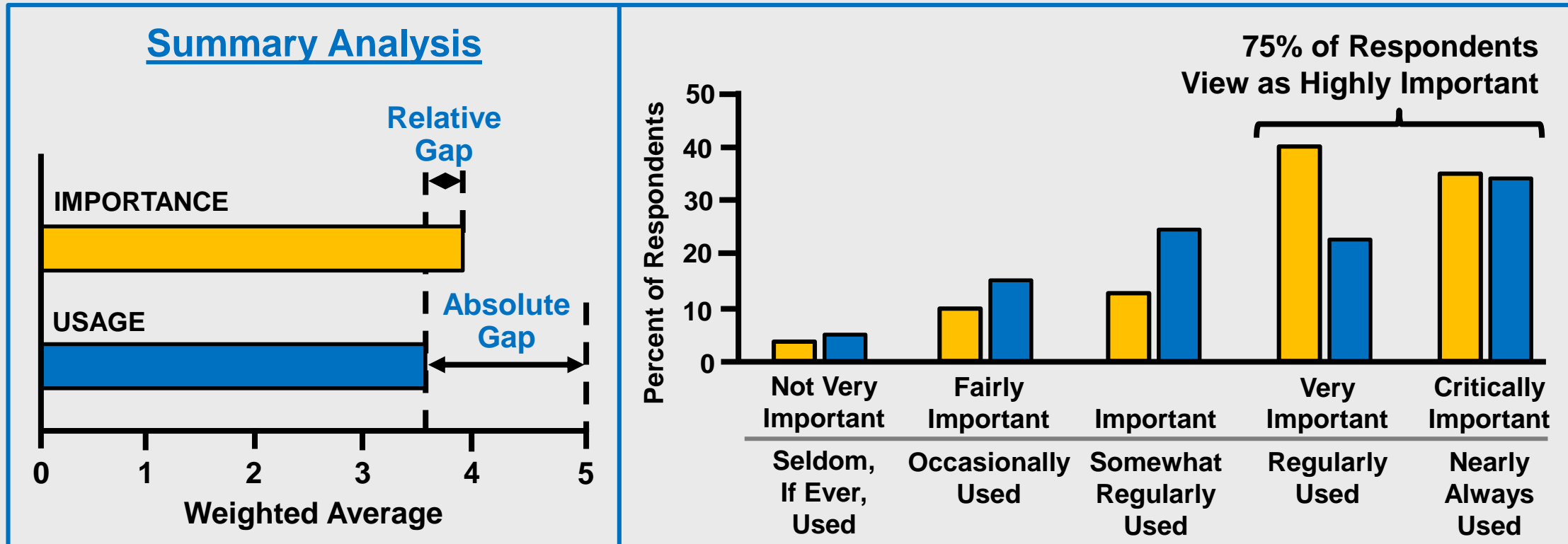
PROPOSAL MANAGEMENT: Coordination of Technical, Management, and Cost

- Issue is an integrated proposal solution that minimizes performance risk
- Gap reflects significant problem in some respondents' companies



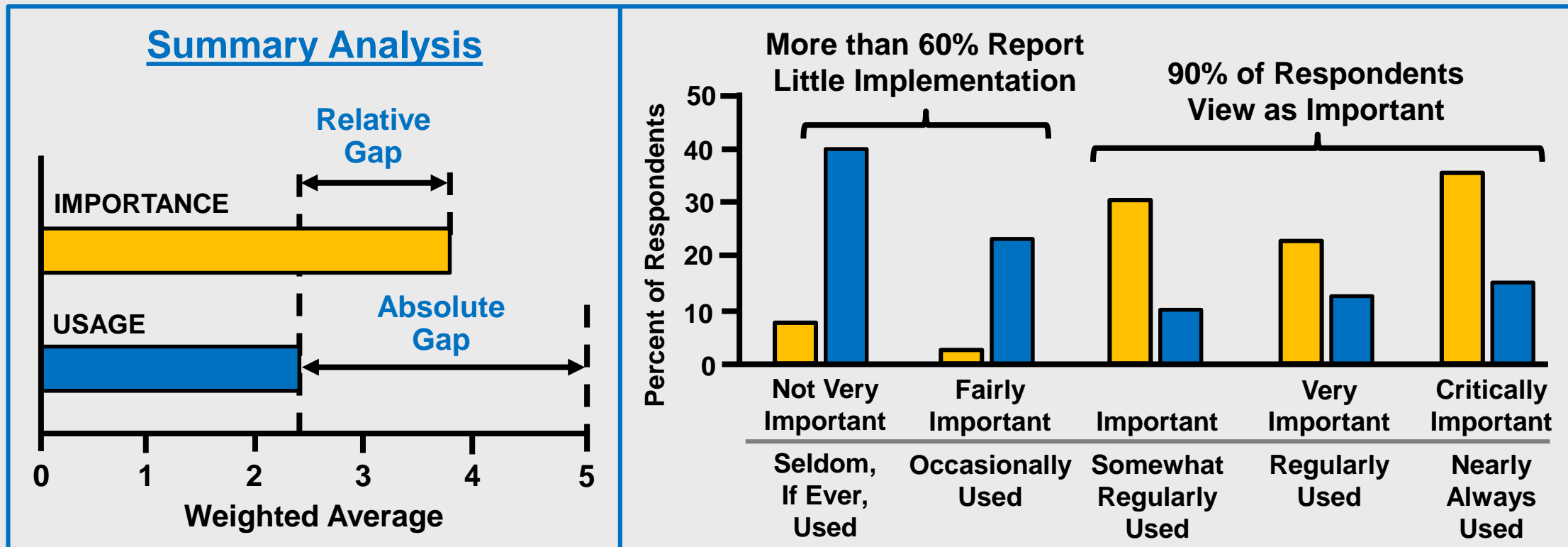
PROPOSAL MANAGEMENT: Use of Management Team Reviews

- Issue is productive involvement of key managers in disciplined process
- Small summary gap belies uneven pattern of implementation



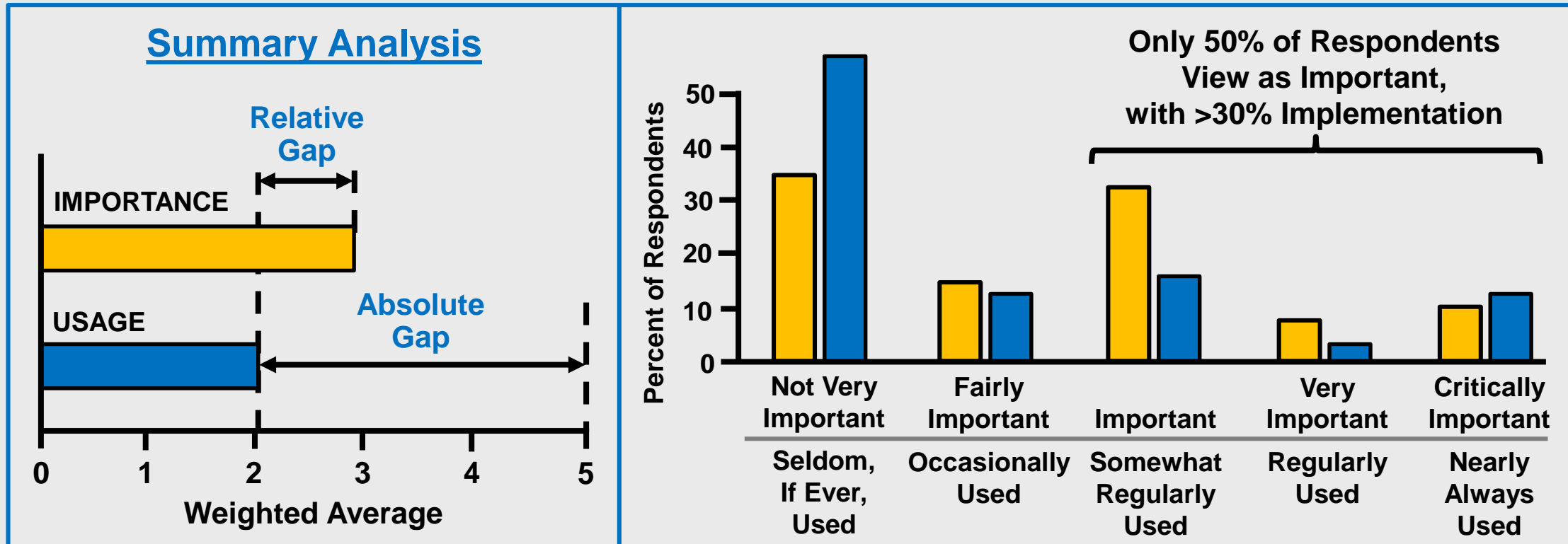
PROPOSAL WRITING: Timely Application of Training

- Issue is assuring proposal team's ability to create a winning proposal
- Major gap is consistent with research into root causes of poor performance



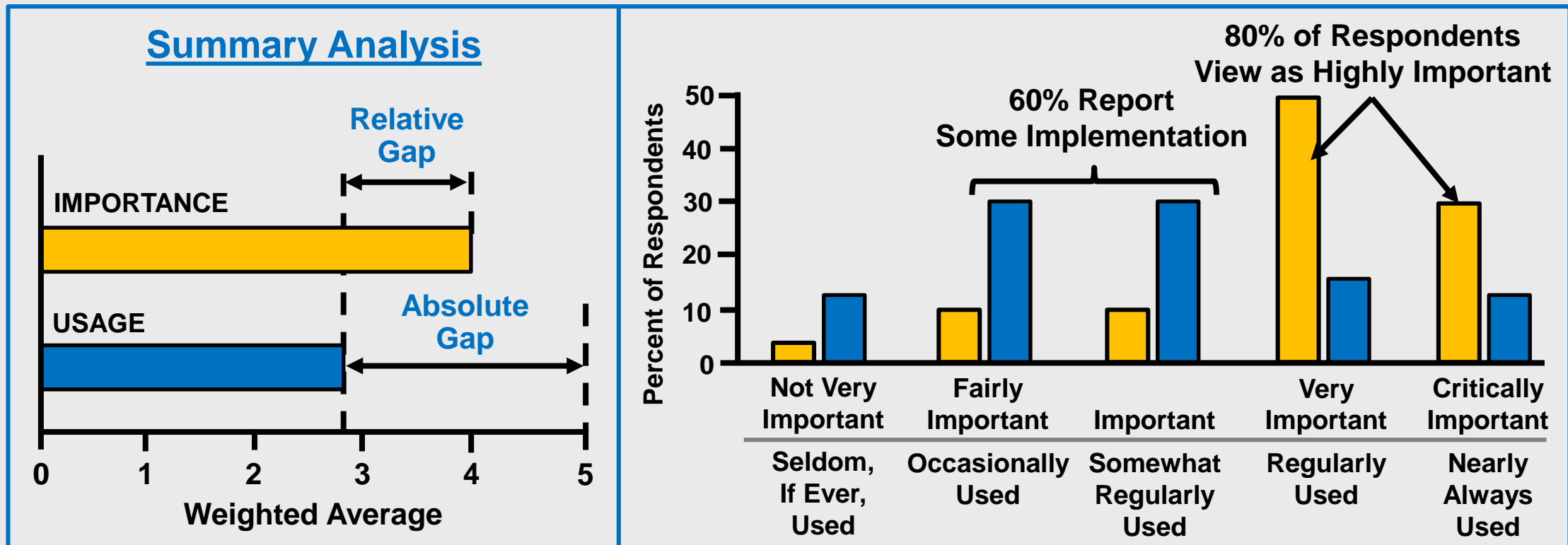
PROPOSAL WRITING: Storyboards and Similar Writing Aids

- Issue is ability to manage writing activities to achieve high quality
- Perceived lack of importance contradicts industry best practice



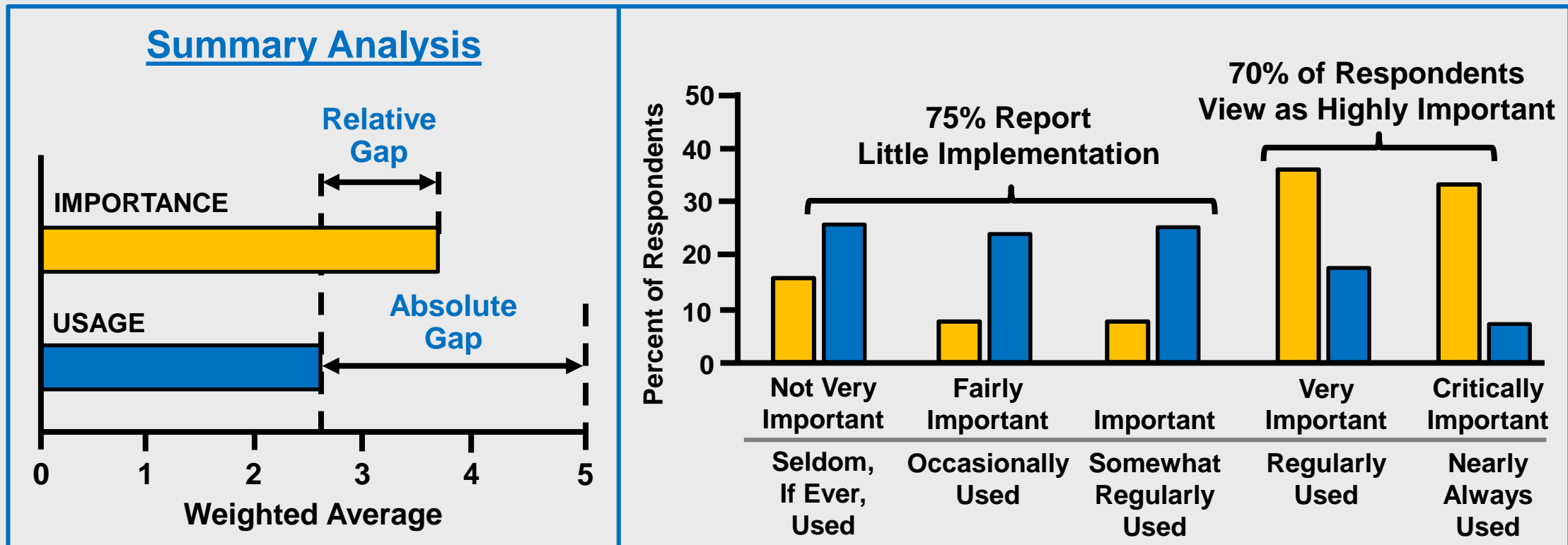
PROPOSAL WRITING: Strategic Use of Themes

- Issue is disciplined ability to present an effective “why us” story
- Substantial gap has major implication for preparing a “winning proposal”



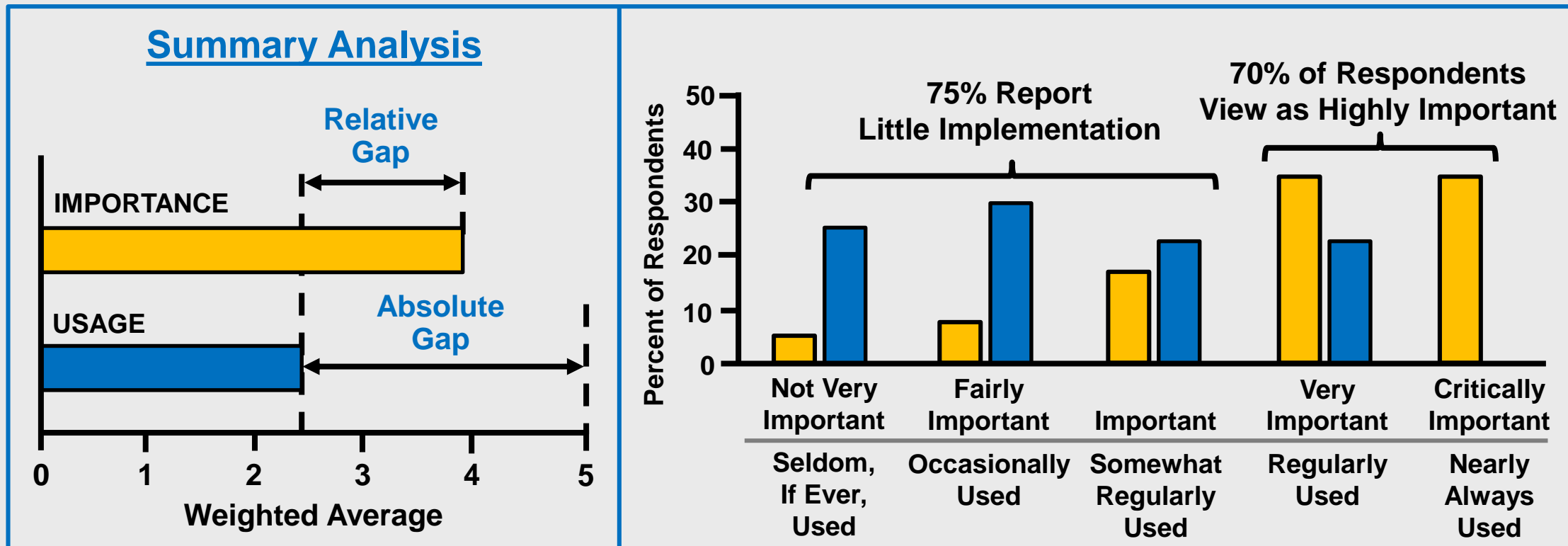
PROPOSAL WRITING: Strategic Use of Graphics

- Issue is visualizing proposed benefits – essential for decision-makers
- Major gap re-enforces a common weakness found across industry



PROPOSAL WRITING: Senior Management Reinforcement

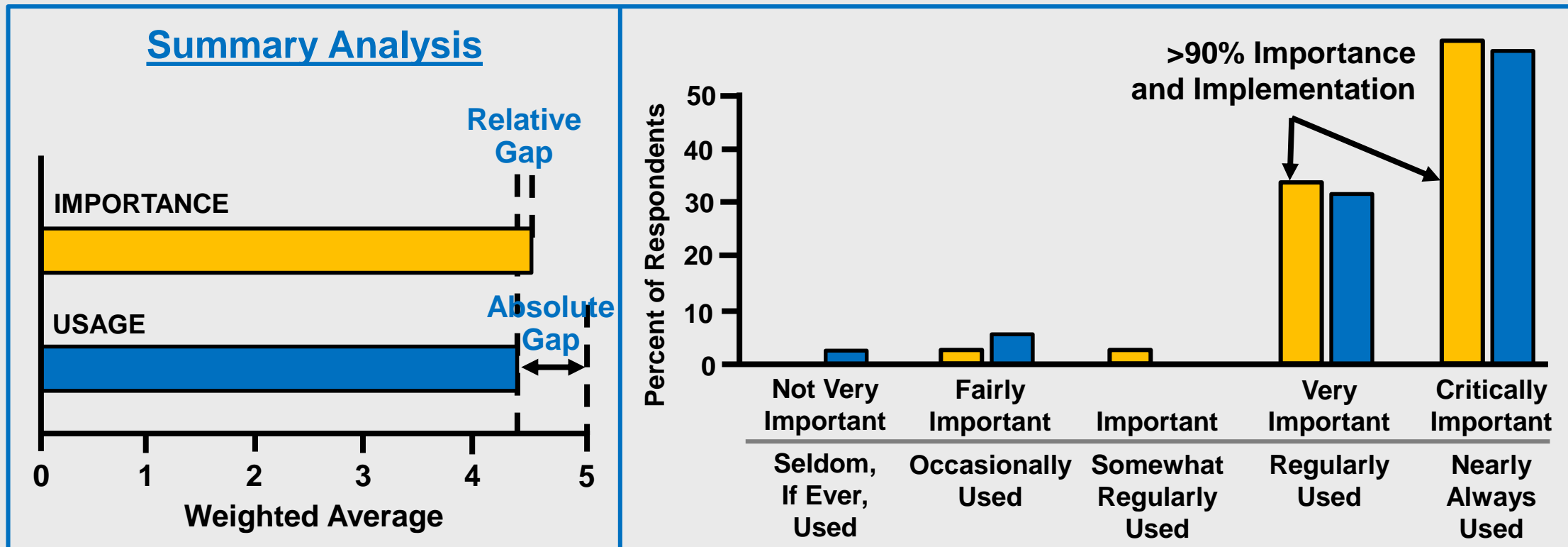
- Issue is getting senior management to add value to proposals
- Major gap re-enforces a common weakness found across industry



PROPOSAL ENABLEMENT:

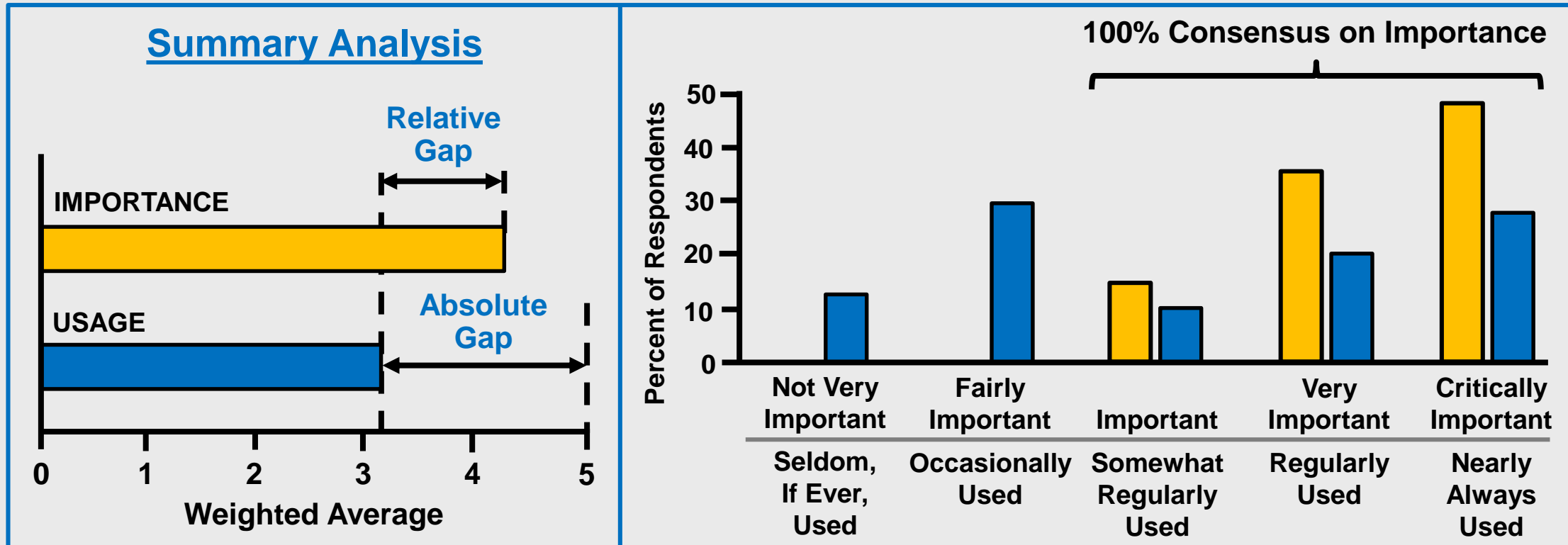
Availability of Templates, Reuse, & Similar Tools

- Issue is to make proposal development faster, better, and more efficient
- Very minor gap indicates an area of high implementation



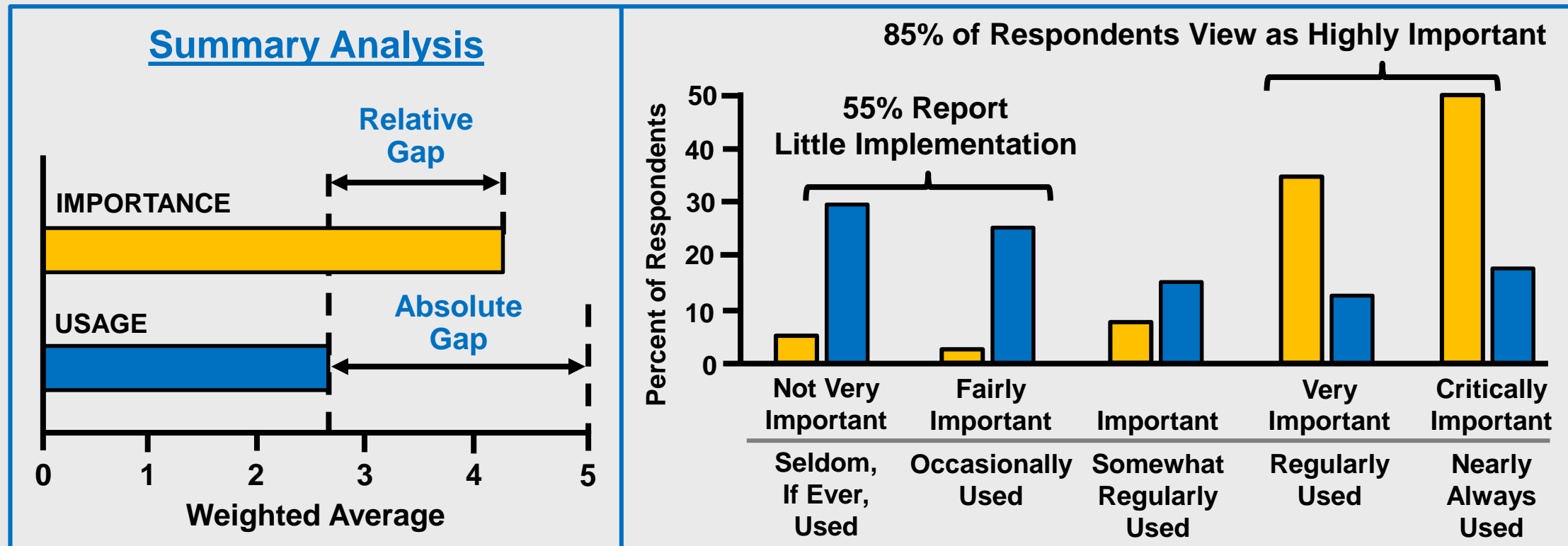
PROPOSAL ENABLEMENT: Dedicated Knowledge Managers

- Issue is to leverage emerging approaches to proposal content
- Gap shows uneven adoption of emerging best practice



PROPOSAL ENABLEMENT: Defined Proposal Training Programs

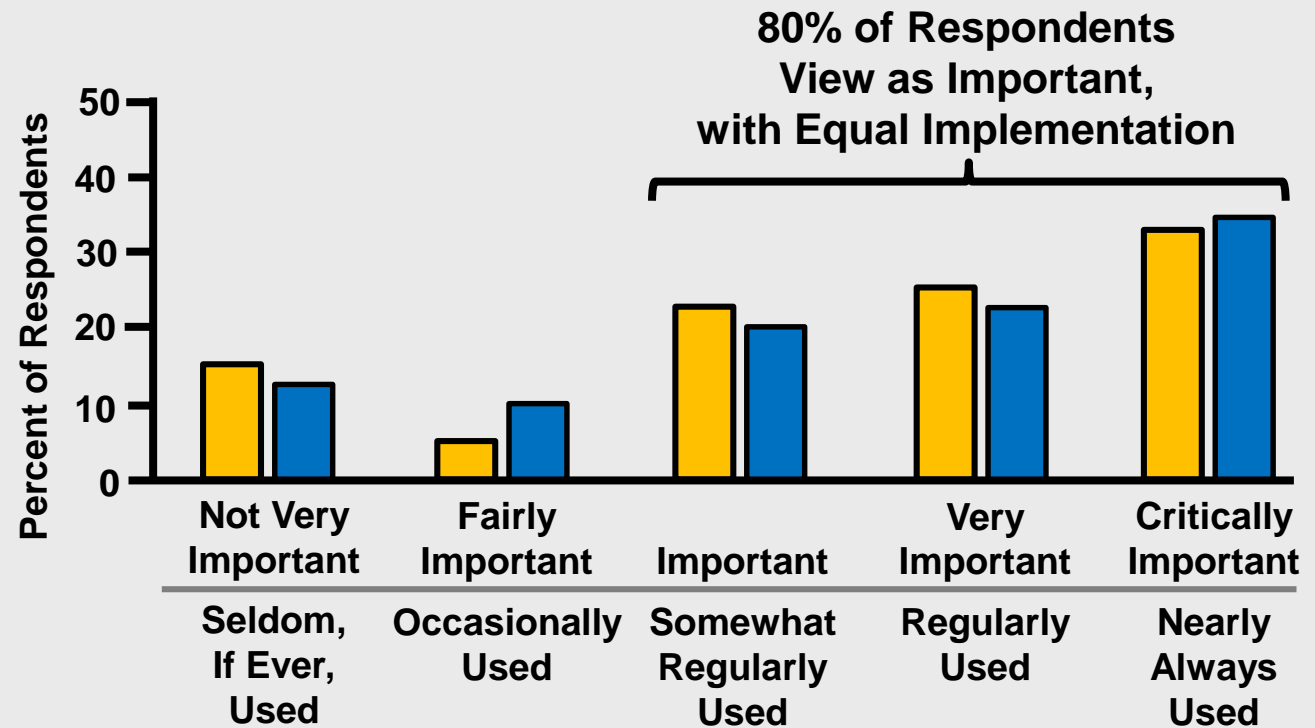
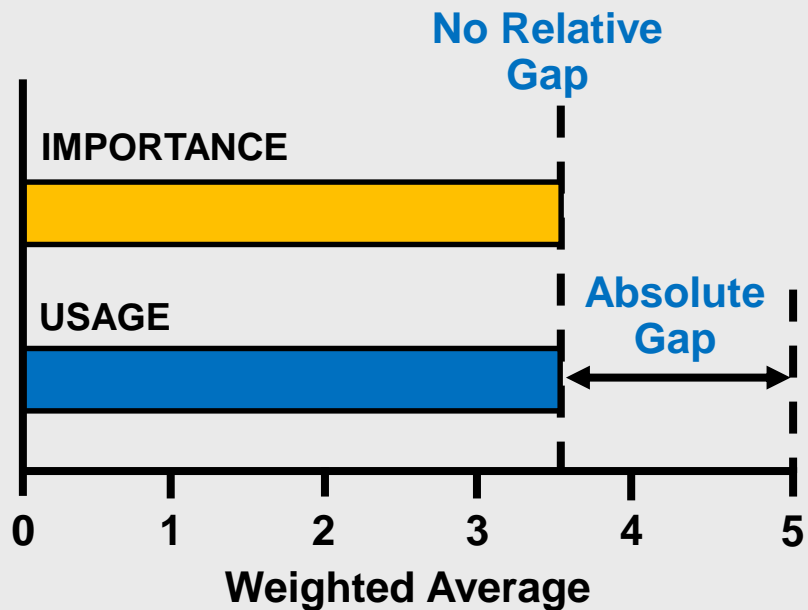
- Issue is to create sustainable proposal competencies in organization
- Major gap reflects common problem of poor investment in broader capability



PROPOSAL ENABLEMENT: Appropriate Physical Work Spaces

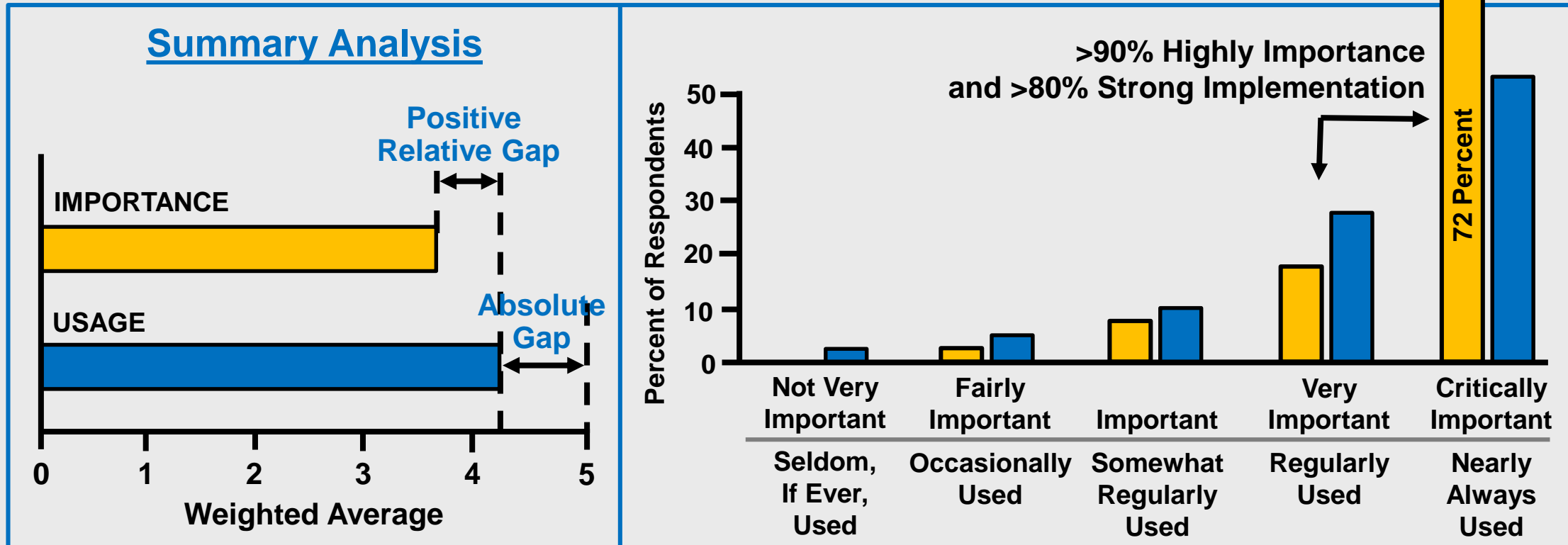
- Issue is to provide basic environment for proposal teams to work
- No gap implies appropriate implementation of important capability

Summary Analysis



PROPOSAL ENABLEMENT: Appropriate Virtual Work Spaces

- Issue is to support contemporary environment of distributed proposal teams
- “Positive gap” illustrates successful transition to virtual proposal operations





Optimizing Your Business Winning Capability

A Strategy Roadmap
to High-Performance Business Winning

Capability Maturity Model®, CMM®, and CMMI® are registered in the US Trademark Office by CMMI Institute LLC

Typical Companies Lack BD Capability

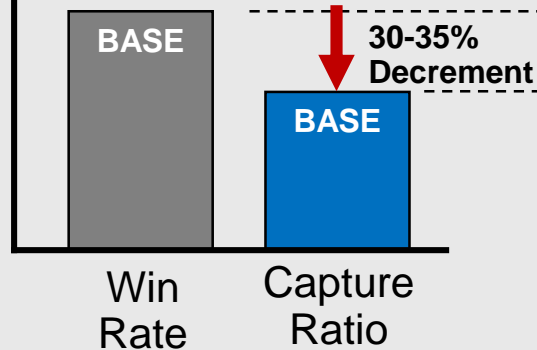
Capability Categories	Customer	Leadership	People	Process Management	Support
Themes	Increasing Customer Value	Building Vision and Performance	Extending Competencies and Teams	Improving Visibility and Accountability	Enhancing Systems and Infrastructure
Maturity Levels	Process Areas (PAs)				
5 Optimizing	Innovation and Transformation				
4 Quantitatively Managed	Relationship Management	Leadership Integration	Collaborative Teaming	Quantitative Performance Management	Integrated Systems
3 Defined	Solution Collaboration	Organizational Direction	Organizational Competencies Development	Organizational Process Management	Knowledge and Infrastructure Management
2 Managed	Response Generation	Sales Management	Individual Skills Development	Project and Quality Control	Work Environment and Tools
1 Initial	Ad Hoc				

Low Capability = Suboptimized Results

BD-CMM Level-1/2 → BD-CMM Level-3 → BD-CMM Level-4/5

Legend:

- Win Rate = $\text{Number of Projects Won} \div \text{Number of Projects Bid}$
- Capture Ratio = $\text{Value of Projects Won} \div \text{Value of Projects Bid}$



Business Winning Goals:



BD Maturity = Major Performance Gains

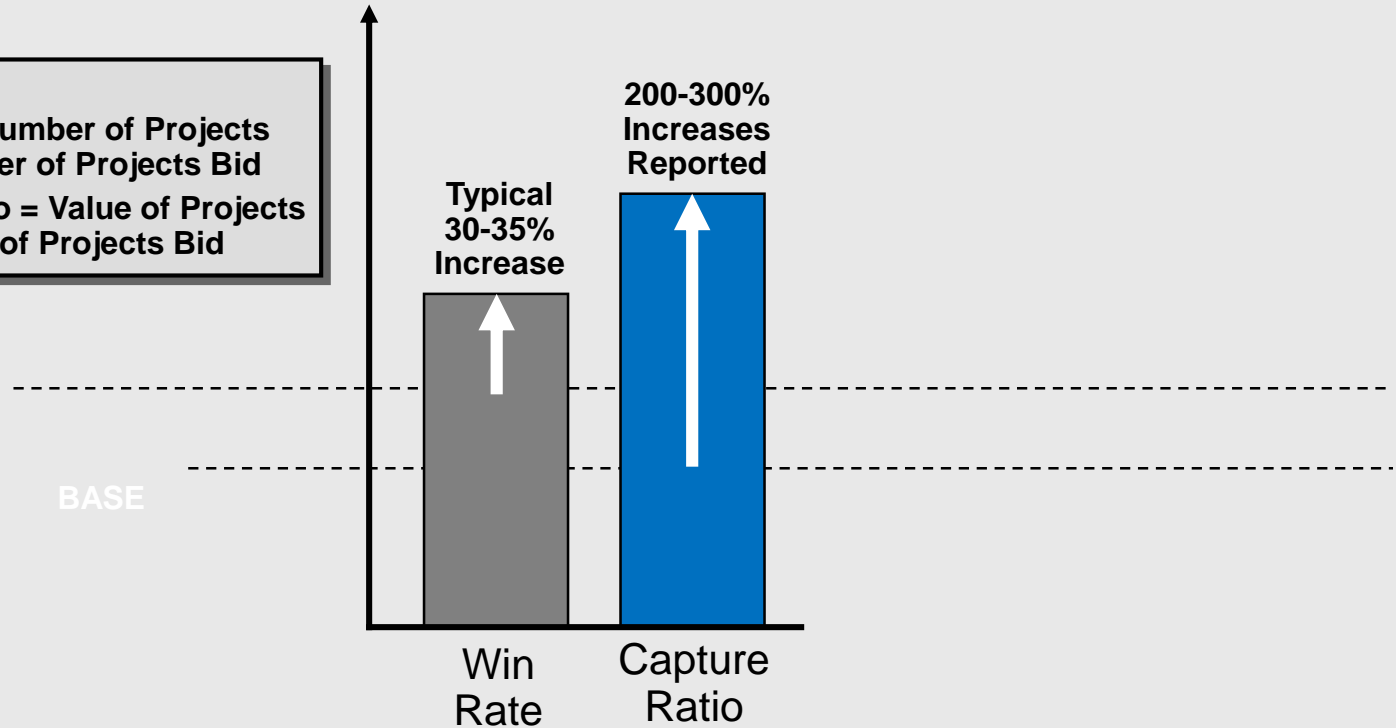


Business Winning Goals:

Win More Business
More Predictably

Reduce the Cost of Winning

- Legend:**
- Win Rate = $\text{Number of Projects Won} \div \text{Number of Projects Bid}$
 - Capture Ratio = $\text{Value of Projects Won} \div \text{Value of Projects Bid}$



Advanced Maturity = Sustainability over Time

Business Winning Goals:

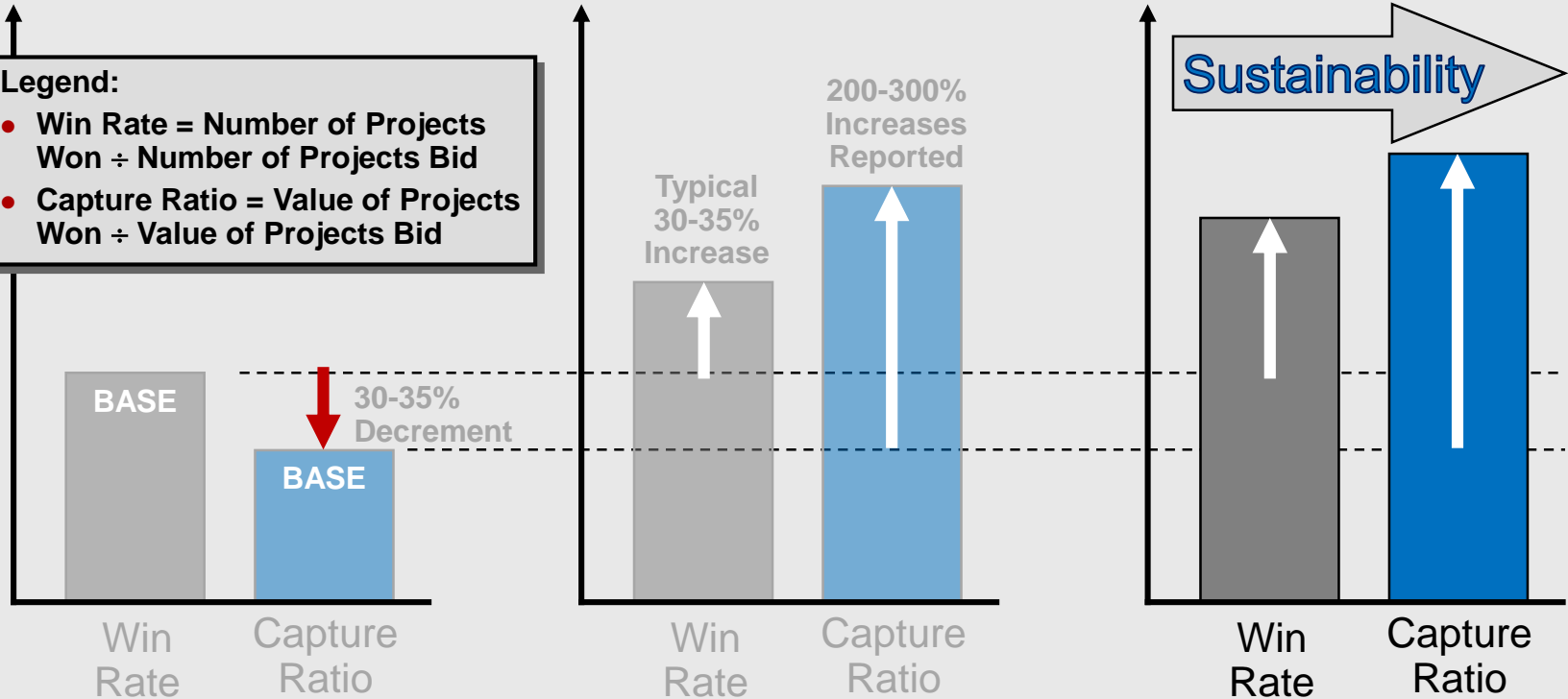
Win More Business More Predictably

Reduce the Cost of Winning

BD-CMM Level-1/2 → BD-CMM Level-3 → BD-CMM Level-4/5

Legend:

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BD-CMM Provides Path to High Performance

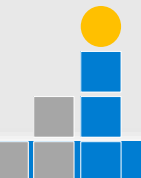
- Demonstrated improvement strategy
- Proven in industry
- Used around the world

Capability Categories	Customer	Leadership	People	Process Management	Support
Themes	Increasing Customer Value	Building Vision and Performance	Extending Competencies and Teams	Improving Visibility and Accountability	Enhancing Systems and Infrastructure
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1 Initial	Ad Hoc				

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