



APMP BID & PROPOSAL CON  
**BOSTON**

**2016** MAY 25-28 SHERATON  
BOSTON  
HOTEL



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# The only proposal development secret **YOU Need to Know**

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# The Challenge



# What to do first?

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- **READ the RFP.** Not cover to cover?
- **Mark it up.** Highlight questions (internal and external), issues, risks, hot buttons
- **Read it all again.** Some sections multiple times
- **Summarize your analysis.** Notes, nuggets, questions, issues/risks
- **Don't be surprised...** to see contradictions and ambiguities

# Now what?

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- Discuss analysis with the team and compare notes
- Resolve questions, issues, and risks
- Develop relevant documents
- Schedule kick-off meeting(s)

# Outline





- Follow instructions exactly
- Resolve instruction/evaluation/requirement conflicts
- Mimic RFP numbering and wording
- Map instruction (numbers) to headers
- Provide as much detail as possible



# Outline Best Practices

- Start with high-level first
- Include 'Overviews'
- Include authors/reviewers
- Target page counts a must
- Review/approve...then
- Develop more detailed outline

| Section Name  | Author/Owner | Reviewer(s)  | Target Pages | Actual Pages | First Draft        |                     |
|---|--------------|--------------|--------------|--------------|--------------------|---------------------|
|   |              |              |              |              | From Author DATE   | Review DATE         |
| <b>2.0 Program Management</b>   | <b>Vicky</b> |              | <b>27.5</b>  | <b>32</b>    |                    |                     |
| Overview (Theme statement, focus box, understanding, and summary graphic) | <b>Vicky</b> | <b>Matt</b>  | 1            | 2            | 6/1/15<br>(5:00pm) | 6/2/15<br>(10:30am) |
| 2.1 Program Management Plan   | <b>Matt</b>  | <b>Vicky</b> | 5.5          | 3.5          | 6/3/15<br>(5:00pm) | 6/4/15<br>(10:30am) |
| 2.2 Communication/ Collaboration Management Plan                          | <b>Wilma</b> | <b>Vicky</b> | 3            | 4            | 6/1/15<br>(5:00pm) | 6/2/15<br>(10:30am) |
| 2.3 Staffing Plan   | <b>Matt</b>  | <b>Vicky</b> | 9            | 10           | 6/9/15<br>(5:00pm) | 6/10/15<br>(5:00pm) |
| 2.4 Knowledge Management Plan   | <b>Wilma</b> | <b>Vicky</b> | 3            | 3.75         | 6/2/15<br>(5:00pm) | 6/2/15<br>(2:30pm)  |
| 2.5 Risk Management Plan  | <b>Wilma</b> | <b>Vicky</b> | 3            | 3.5          | 6/4/15<br>(5:00pm) | 6/5/15<br>(10:30am) |
| 2.6 Performance Management Plan   | <b>Matt</b>  | <b>Vicky</b> | 3            | 5.25         | 6/5/15<br>(5:00pm) | 6/8/15<br>(2:30pm)  |

|  |                                     |
|--|-------------------------------------|
|   | Not submitted or unacceptable       |
|   | Submitted and marginally acceptable |
|   | Submitted and acceptable            |
|  | Submitted and outstanding/complete  |

# Theme Statement Best Practices

“The Thesis Statement shows the reader at a glance the essential argument of the theme body...the reader is relieved of the common vexation: When will this passage end, and what point is the author driving at?”

---STOP Manual , Hughes Aircraft, 1965



# What's a theme?

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- Best value
- No risk
- We understand you – better than anyone
- CMMI Level 3 best practices
- Relevant past performance
- Superior technical solution








# Theme Shortcut

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$$\begin{array}{r} \text{Benefit} \\ + \text{Feature} \\ + \text{Proof} \\ \hline = \text{THEME} \end{array} \quad \begin{array}{l} \text{(Customer stuff)} \\ \text{(Your stuff)} \\ \text{(Metrics; Third party stuff)} \end{array}$$

# What else can go wrong?

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-  Unrealistic schedule
-  No solution before writing begins
-  Non-compliant first draft
-  Poor/inconsistent writing quality
-  Graphics are an afterthought or irrelevant
-  Inefficient proposal review/recovery processes
-  Writers bolt for the boilerplate

# First Draft Worst Practice



Our <company name> <(Acronym)> is pleased to respond to this <long project name> <(Acronym)> for <long customer name> <(Acronym)>.

More about us...Blah, blah, blah **founded in 1998, 250+ employees in 100 countries, with 45% growth rate.** <Aren't we great and aren't we special?> .....blah blah.

Blah blah, blah blah, this is a **mission-critical project.** Blah blah. We are a **best-in-class**, blah blah. Our technical solutions are **leading edge** blah blah. Blah blah we have assembled a **best-of-breed "A-Team"**.

Blah blah blah <**your vague or generalized statement here**> blah, blah <**unsubstantiated claim here**>. Blah blab, blah blah, blah, blah, **no transition risk.**

Our superior technical approach includes <**buried theme here**>and <**unsubstantiated claim here**>.





Instructions

### Task 1 Compliance Instructions

**RFP INSTRUCTIONS:** <Insert relevant instructions from the RFP here. Highlight key words and phrases for emphasis.>

Evaluation  
Criteria

**RFP EVALUATION CRITERIA:** <Insert relevant evaluation criteria from the RFP here. Include actual or calculated criteria weightings. Highlight key words and phrases for emphasis >

Detailed  
Requirements

**DETAILED REQUIREMENTS:** <Insert the detailed (SOW, PWS, or other requirements for this task here. Highlight key words and phrases for emphasis >

High-level  
Outline

#### HIGH-LEVEL OUTLINE AND PAGE COUNT TARGETS:

##### 1.2 "Task 1" <2.5 pages>

Theme statement, focus box, and understanding the need <0.5 pages>

##### 1.2.1 Broad Description of the Work <0.5 pages>

<Include overview graphic and action caption>

##### 1.2.2 Detailed Subtasks and Activities <1.5 pages>

1.2.2.1 <"Subtask 1.1">

1.2.2.2 <"Subtask 1.2">

1.2.2.3 <"Subtask 1.3">

##### 1.2.3 Relevant Projects and Key Personnel <0.5 pages>

Additional  
Guidance

#### OTHER WRITER INSTRUCTIONS AND GUIDANCE:

<Insert other proposal and/or section specific information here to help the writer and the team be more efficient and effective:>

1. Deadline date and time
2. Name and location of file
3. Level of completion and quality
4. Additional guidance on writing style, tone, key words, readability (targets), etc.

# Detailed Writing Instructions/Template

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- Theme statement
- Focus box
- Understanding
- Major sections
- Graphics/Action captions

# Detailed Theme Instructions

Instructions:

1.2 <“Task 1”> <4.0 pages>

*<Insert a 4-5 line benefit-based theme statement here starting with “We” that links the (low risk, increased efficiency, or increased effectiveness) benefit to the 1-2 major features of our approach.>*

Example:

*We reduce schedule and delivery risks with proven people, processes, and technologies used on five highly relevant projects.*



# Detailed Focus Box Instructions

## Instructions:

**<Insert Headliner Here start with “Our..” and Link Major Feature to Benefit>**

- <Summarizes major features of this section that support the theme sentence>
- <Support by quantitative metrics-based facts>
- <2 lines of text per bullet>
- <4 bullets maximum>

## Example:

**Our Proven People, Processes, and Technologies Reduce Delivery Risk**

- 8 Key Personnel average 15 years’ role relevant experience
- Master schedule includes 130 detailed management process subtasks and activities
- Management system includes Microsoft Project, Deltek and other standard tools

# Detailed ‘Understanding’ Instructions

## Instructions:

<Insert a 6-8 line unnamed ‘understanding the need’ paragraph focused on providing value added insight into what your customer wants to satisfy this task. Consider starting with a value-added summarization of the requirement from the RFP or related documents. Include competitor ghosting if relevant. Finish with a springboard ‘grabber’ sentence to set-up the broad description of our solution.>

## Example:

Effective and efficient project management has never been more important as <customer name> considers replacing the long-standing incumbent contractor. The magnitude and complexity of this project including the interdependency of complex tasks, the close collaboration required with your management team, and the proven tools you need to maintain contractor accountability, are the keys to management success. We reduce project risk and increase management effectiveness with proven people, processes, and tools we have successfully used on other highly relevant projects.

# Detailed 'Overview' Instructions

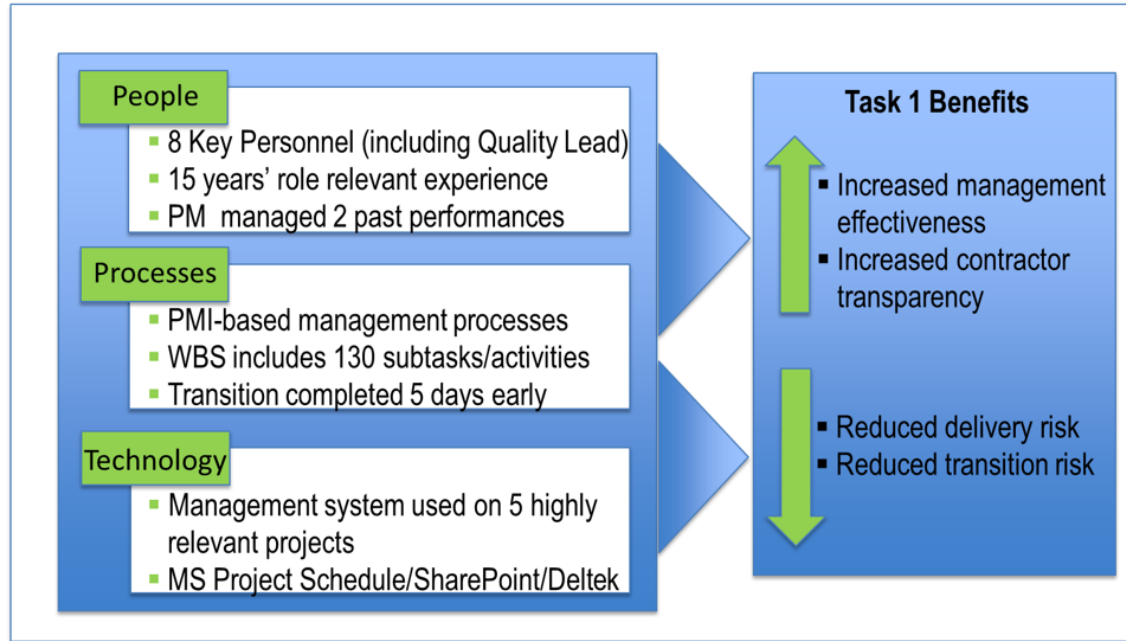
## 1.2.1 Broad Description of the Work (L.2)

<Describe our overall strategy for this first customer requirement. Highlight strategic “approach operations, and procedures” for this task in no more than two short 5-6 line paragraphs. Highlight “technical improvements” that we propose and use “examples” that “build on the RFP” requirements”. Will evaluators recognize any of these as “creative” solutions to “maximize use of funding”? Use a callout sentence to point to overview graphic, e.g., **Figure 1-2** summarizes the main benefits and features of our approach to this task.>



# Detailed Graphic/Caption Instructions

- Theme aligned
- Repetition OK
- Metrics
- T to B; L to R
- Benefits



**Figure 1.2. Task 1 Solution Overview.** <Insert a 2-line action caption theme statement highlighting the main benefits and supporting features of our Task 1 solution.>

Theme  
Statement

Understanding

Graphic/  
Caption

Focus  
Box

Overview

## 1.2 <Task 1> <4.0 pages>

<Insert a 3-5 line benefit-based theme statement here starting with "We" that links the (low risk, increased efficiency, or increased effectiveness) benefit to the 1-2 major features of our approach.>

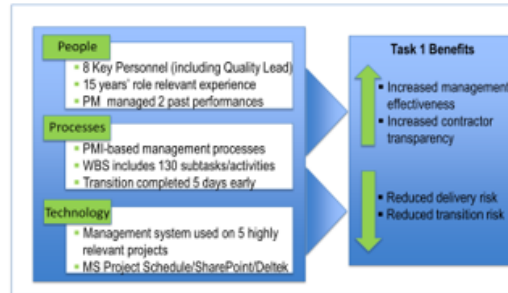
<Insert a 6-8 line unnamed "understanding the need" paragraph focused on providing value added insight into what your customer wants to satisfy this task. Consider starting with a value-added summarization of the requirement from the RFP or related documents. Include competitor ghosting if relevant. Finish with a springboard "grabber" sentence to set-up the broad description of our solution.>

### <Insert Headliner Here start with "Our..." and Link Major Feature to Benefit>

- <Summarizes major features of this section that support the theme sentence>
- <Support by quantitative metrics-based facts>
- <2 lines of text per bullet>
- <4 bullets maximum>

### 1.2.1 Broad Description of the Work (L.2)

<Describe our overall strategy for this first customer requirement. Highlight strategic "approach operations, and procedures" for this task in no more one short 5-6 line paragraph. Highlight "technical improvements" that we propose and use "examples" that "build on the RFP" requirements". Will evaluators recognize any of these as "creative" solutions to "maximize use of funding"? Use a callout sentence to point to overview graphic, e.g., **Figure 1-2** summarizes the main benefits and features of our approach to this task.>



**Figure 1.2. "Task 1 Solution Overview".** <Insert a 2-line action caption theme statement highlighting the main benefits and supporting features of our Task 1 solution.>

# Contact Chris

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# Who's Chris?

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- Consultant; Rainmaker; BD expert; Trainer
- APMP Fellow; Award winning author; Frequent presenter
- Reputation for passionate, entertaining, and content-rich sessions
- Founder and principal, Rainmakerz Consulting ([www.rainmakerz.biz](http://www.rainmakerz.biz))
- 180+ customers; \$82 billion in new contract awards
- APMP NCA Board of Directors; Mentor of the Year
- Consulting Magazine's Top 25 Consultants (nominee)
- Deloitte Consulting Partner
- MBA, Information Technology, University of Massachusetts (Amherst)

# Contact Us

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