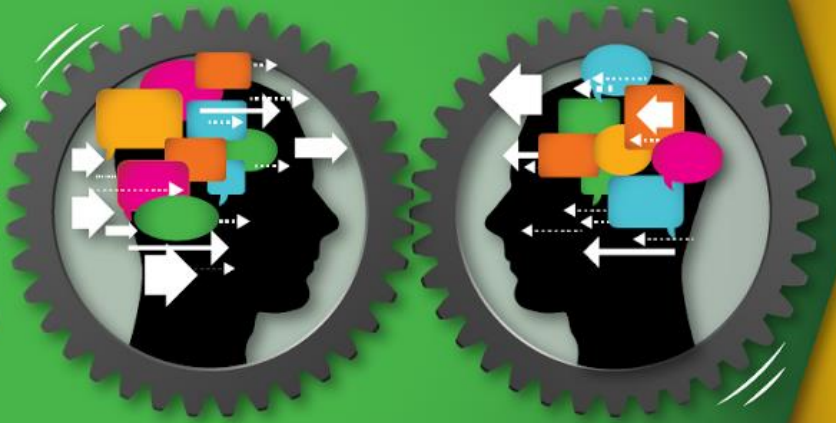OCTOBER 20-21

ENGAGING THE NEXT...

APMP-NCA
MID-ATLANTIC
CONFERENCE & EXPO 2016

NextGen proposal secrets
You Need to Know

Chris Simmons
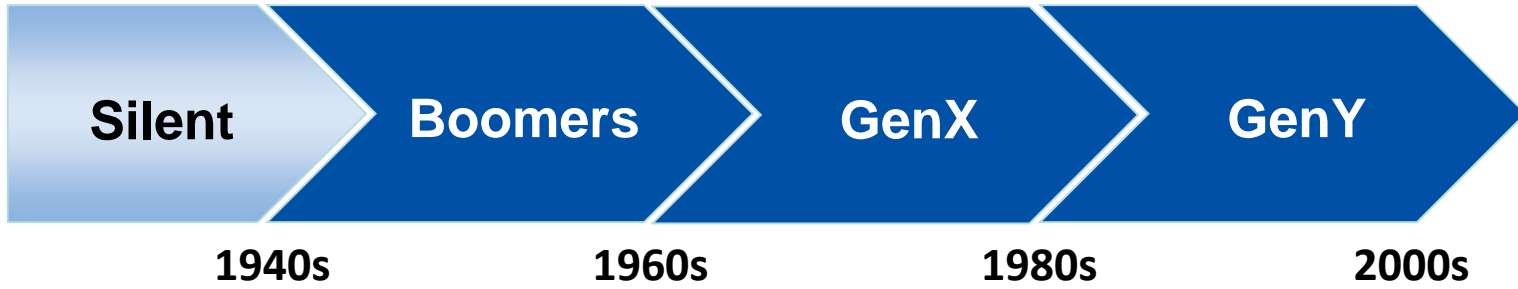**Founder and Principal**
Rainmakerz Consulting LLC

NCA
APMP

Talkin' bout <u>your</u> generation

Silent	Boomers	GenX	GenY

1940s   **1960s**   **1980s**   **2000s**

Millennials (21-36 years young)

– Largest share of US workforce

– Stereotypes: Lazy, entitled, selfie-lovers, impatient, job jumping trophy kids

– Entry and mid-level BD and proposal support roles

Most don't fit the stereotypes (numerous studies)

– Tech savvy, global citizens, progressive, self-confident, multi-taskers, strong work/life balance, not job jumpers, "feel the Bern"

– Stereotypes trumped by

- Education/Career choices
- Personality type (MBTI)
- Astrological zodiac
- Chinese zodiac
- Numerology, Tarot, others

Dustin Moscowitz

The BD challenge

Strategic Planning → **Capture** → **Proposal**

What to do first?

- **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?

– 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

–Repeat...follow instructions exactly

–Resolve instruction/evaluation conflicts

–Mimic RFP numbering and wording

–Allocate page count targets

–Map instruction (numbers) to headers

–Provide as much detail as possible

– Start with high-level first

– Include 'Overviews'

– Include authors/reviewers

– Target pages a must

– Review/approve...then

– Develop more detailed outline

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

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

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

11

What's a theme?

"The Thesis Statement shows the reader at a glance the essential augment 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

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

–Theme aligned

–Repetition OK

–Metrics

–T to B; L to R

–Benefits

People
- 8 Key Personnel (including Quality Lead)
- 15 years' role relevant experience
- PM managed 2 past performances

Processes
- PMI-based management processes
- WBS includes 130 subtasks/activities
- Transition completed 5 days early

Technology
- Management system used on 5 highly relevant projects
- MS Project Schedule/SharePoint/Deltek

Task 1 Benefits
- Increased management effectiveness
- Increased contractor transparency

- Reduced delivery risk
- Reduced transition risk

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.>*

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

Bolt for the boilerplate!?

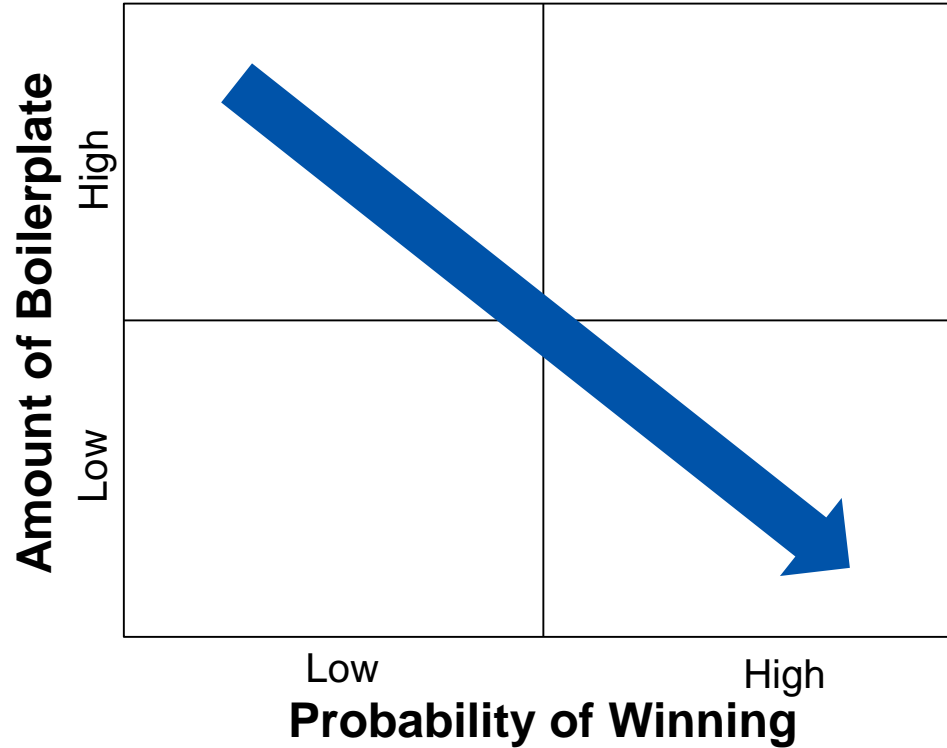– Reusability = time and $$ savings?

– If the artifacts come from a winning proposal they must be good!

– Target reuse areas
  - Resumes (High)
  - Management (Medium)
  - Past Performance (Medium)
  - Technical (Low)
  - Executive Summary (Low)

Source: *Powerful Proposals: How to Give Your Business the Winning Edge, Pugh and Bacon*

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>.**

Detailed content plan (Instructions)

- RFP instructions
- RFP evaluation criteria
- RFP detailed requirements
- Detailed annotated outline and page targets
- Other instructions/guidance

<CUSTOMER NAME>
<PROJECT NAME>

Rainmakerz

Task 1 Compliance Instructions

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.

<Solicitation Number> RFP Response 1.1 <Month dd, 2016>

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

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.

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

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.

<CUSTOMER NAME>
<PROJECT NAME>

Rainmakerz

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.>

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.>

<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>

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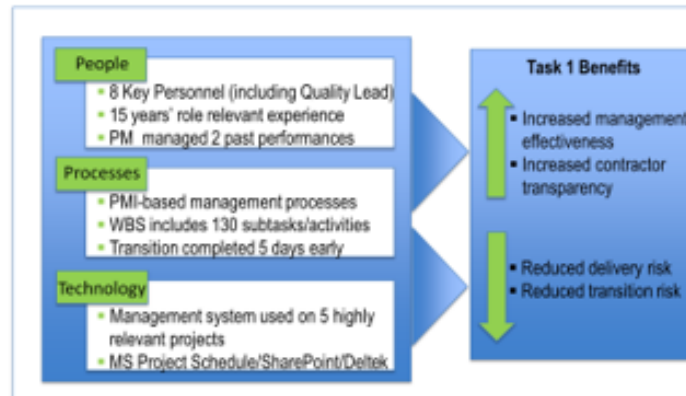- Reduced delivery risk
- Reduced transition risk

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.>*

- Provide detailed instructions and content plan mock-up
- Don't fall into stereotype trap
- Listen and learn
- Recognize individual differences
- Look for ways to connect and motivate (mentoring and training)
- Provide direction and feedback
- Be flexible and adaptable (people change)
- Be positive and **have fun!**

ISTJ	ISFJ	INFJ	INTJ
Responsible Executors	Dedicated Stewards	Insightful Motivators	Visionary Strategists
ISTP	ISFP	INFP	INTP
Nimble Pragmatics	Practical Custodians	Inspired Crusaders	Expansive Analysers
ESTP	ESFP	ENFP	ENTP
Dynamic Mavericks	Enthuiastic Improvisors	Impassioned Catalysts	Innovative Explorers
ESTJ	ESFJ	ENFJ	ENTJ
Efficient Drivers	Committed Builders	Engaging Mobilizers	Strategic Directors

Chris

Recommended reading

1. *Generation Feud, Can Springsteen and Bieber Really Work Together?,* APMP 2013 Bid & Proposal Con, Brad Douglas and David Sotolongo

2. *How to Create Winning Proposal Themes*, APMP Journal, 2012

3. *Millennials Think About Work Too Much*, Harvard Business Review, Ran Zilca, 2016

4. *Powerful Proposals: How to Give Your Business the Winning Edge*, Pugh and Bacon, 2005

5. *Shipley Capture Guide (Third Edition),* Shipley Associates, Larry Newman, 2011

6. *Shipley Proposal Guide (Fourth Edition)*, Shipley Associates, Larry Newman, 2011

7. *The Beginnings of STOP Storyboarding and the Modular Proposal*, APMP Proposal Management Journal, Fall 2000, Walter Starkey

8. *What do Millennials Really Want at Work?,* Harvard Business Review, Bruce Pfau, 2016

9. *Writing Business Bids & Proposals for Dummies*, Neil Cobb and Charlie Devine, 2016

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Please rate this presentation: http://bit.ly/MAC-Y1

Who's Chris?

– Baby Boomer; Consultant; Rainmaker; BD expert; Trainer

– APMP Fellow; Certified Practitioner; Award winning author

– Reputation for passionate, entertaining, and content-rich sessions

– Founder and principal, Rainmakerz Consulting (www.rainmakerz.biz)

– 190+ customers; Billions in new contract awards

– APMP NCA Board of Directors; Mentor of the Year

– Consulting Magazine's Top 25 Consultants (nominee)

– Deloitte Consulting Partner; CGI Senior Principal

– MBA, Information Technology, University of Massachusetts (Amherst)