



The Proposal Centre helps clients to increase their business by supporting them in managing opportunities and efficiently developing compliant and compelling proposals and other business development documents.

Presented by:

Keith Parker
Managing Director
The Proposal Centre
September 14, 2011

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Successful Proposals

Not just the start of successful projects

Presented by:

Keith Parker, Managing Director and Founder
The Proposal Centre

Date: September 14, 2011



Never Again....

“On the wall of my former manager’s office hung a testament to how, despite the best of intentions, a large proposal involving dozens of people and countless hours of effort can easily come down to a frantic, last-minute tear through the streets of Ottawa and Gatineau.”

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Agenda

- Overview of Proposals
- The Proposal Lifecycle as a Project
 - Initiating: Bid-No Bid Decision, Charter
 - Planning: Proposal Management Plan
 - Execution: The Art and the Science
 - Monitoring/Controlling: Methods and Tools
 - Closing: Make the most of the Effort!
- Questions and Feedback

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Overview of Proposals

- What is a proposal?
 - Sales Document or Presentation
 - Contractual Offer
- Why do a Proposal?
 - Win new business or maintain/renew business
 - Gain or maintain access to business opportunities
 - Access to larger and more complex projects
 - Satisfy Client Expectations
 - Introduction to Potential Client
- Consider the client's perspective:
 - Match the right supplier with the right buyer
 - Open, transparent and auditable process
 - Put a Check Mark in the box
 - "Directing" an opportunity to a supplier

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Proposal Lifecycle: Initiation

- Capture Management and Planning
- Opportunity Identification
- Opportunity Assessment
- Bid-No Bid Decision
- Proposal Charter

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The Bid-No Bid Decision: Selecting the right opportunity

- Possible Reasons to bid:
 - You have a good chance at winning and in achieving a business goal (profit, growth, other)
 - You are “obligated” to bid
 - You want to introduce yourself
 - It is a learning opportunity
- Avoid bids where:
 - You are not compliant
 - The bid is wired to a competitor
 - The bid investment is disproportionate to the potential benefits

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The Bid-No Bid Decision: Selecting the right opportunity

- Questions to Ask:
 - Does this fit a business strategy?
 - Can we successfully deliver?
 - Can we win?

**Always make a formal
Bid–No Bid decision**

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The Proposal Charter

An important first step

- Contains existing background on market, customer, competition and strategy
- Names Proposal Manager or Management Team
 - Proposal Manager
 - Sales
 - Delivery
- Defines Success



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Proposal Lifecycle: Planning

- Proposal Strategy and Win Themes
- Procurement/Teaming Strategy
- Proposal Team and Responsibilities
- WBS and Scheduling
- Executive Summary
- Proposal Shell and/or Storyboards
- Information Sources (Boilerplate)
- Style and Writing Guide

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Proposal Management Plan

- Opportunity Details
 - Customer Profile
 - Competitive Analysis
 - Proposal Strategies and Themes
 - Personnel Roles & Responsibilities
 - Proposal Operations
- Attachments:
 - Schedule
 - Outline
 - Style Guide
 - Executive Summary
 - WBS and WBS Dictionary

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Responsibility Assignment Matrix

Item	Description	Points	Author	Owner	Due Date
1.0	Corporate Profile	100		JB	Mar 2
1.1	Years Experience	10	TT	JB	Feb 23
1.2	Description of Services	20	RZ	JB	Feb 23

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Proposal Lifecycle: Execution

- Iterative and Collaborative Approach
 - The Science: Answer the Question
 - The Art: Beyond the Requirements
 - Always Update and Tailor Boilerplate
- Solution Design
- Questions of Clarification
- Pricing
- Production and Publication
- Delivery and Submission

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Managing Questions and Answers

- Bidders can usually ask questions of the buyer
- Benefits:
 - Obtain clarification or a better understanding of the RFP requirements, client environment, or objectives
 - Seek amendments that allow you to comply or that position your offer favourably
- Risks:
 - Attention drawn to a weakness
 - Inform competitors of your proposal strategy
 - A negative response may render you non-compliant
- Carefully consider each question and craft it in a way that will generate the response you are seeking.

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The Science: “Putting the checkmark in the box”

- Answer the question first, THEN support your answer
- What the client wants, the client gets
- How the client wants it, is how the client gets it
- Use RFP Terminology
- Set-up a Summary “Grid”,

Criteria	How Met	Page #	Comply?
M1. Must demonstrate eight (8) years experience as Captain of an NHL Team	Our proposed resource, Daniel Alfredsson, has 12 years of experience as a Captain of an NHL Team as follows: <ul style="list-style-type: none"> • Ottawa Senators, October 1999 to Present 	Appendix A Page 12	Yes

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The Art: Beyond the requirements

- Public Sector Proposals are about telling your story using their structure, plot and ending
- Develop and integrate win themes:
 - Expressed and implied reasons to pick you
 - Win themes should be spread out and consistent across the whole bid
- Focus on benefits relevant to the client
- Tailor your boilerplate, résumé and references to reflect and be relevant to the client
- Persuasion without education

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Proposal Lifecycle: Monitoring and Controlling

- Key Tracking Tool: Requirements Tracking Matrix
- Document Version Control
- Document Reviews
 - Green/Pink Team Reviews
 - Red/Gold Team Reviews
- Quality Assurance Reviews
- General Progress Updates/Reviews
- Scope Control is a special consideration for proposals AND the proposal content

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Requirements Tracking Matrix

Item	Description	Owner	First Draft	Second Draft	Final
1.0	Corporate Profile	JB	✓		
1.1	Years Experience	JB	✓	✓	
1.2	Description of Services	JB	✓		

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Proposal Lifecycle: Closing

- Archiving the Proposal
- Create or Update Boilerplate Library
- Lessons Learned with Project Team
- Questions of Clarification
- Prepare materials for:
 - Presentations and Interviews
 - Negotiation and contract award
 - Performance of Work
- Debrief with client
- At end of all company/personal projects:
 - Obtain reference, write project summary, and archive work products (Part of project closure – full circle)

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Summary of Successful Proposal Efforts

- **Initiation**
 - Objective Assessment
 - Make a formal Bid-No Bid Decision
 - Create Proposal Charter – Define Success
- **Planning**
 - Develop Proposal Management Plan
- **Execution**
 - Iterative Writing and Review
 - The Science: Answer the Question
 - The Art: Win Themes and Customer Focus

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Summary of Successful Proposal Efforts

- **Monitoring and Controlling**
 - Requirements Tracking Matrix
 - Document Version Control
 - Proposal and Company Reviews

- **Closing**
 - Archive the Proposal
 - Save Boilerplate
 - Prepare for post-submission activities (e.g. questions of clarification, presentations, contract negotiation, project start-up)

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Any questions?

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