Developing Effective Capture and Proposal Strategies for Government Evaluations

Presented by Red Team Consulting
February 23, 2017
INTRODUCTION

Red Team’s major areas of support include:

- Proposal management
- Capture management and planning
- Proposal writing
- Price strategy and price to win
- Editing, desktop publishing, graphics
- Training and seminars
- Business management consulting

Industries we support:

- Information Systems
- Communications Technology
- Physical Protection Services
- Marketing and Communications
- Construction
- Logistics
- Healthcare
- Manufacturing

About Red Team Consulting . . .

Red Team Consulting is a woman-owned small business headquartered in Reston, VA providing a wide range of consulting services in support of federal contracting activities. Our mission is simple – we strive to help our clients grow. Red Team and Red Team personnel have supported over a thousand federal procurements across nearly every agency in the federal government and we have a current portfolio of over 500 clients ranging from small businesses to large systems integrators and consulting firms. Our clients are throughout the US and overseas in countries such as England, UAE, and Kuwait. Red Team has supported the capture of over $100 billion worth of federal contracts since the company was founded in March of 2004.
Jeffrey Shen

- VP and GM of Red Team
- 20 years of federal contracting and program management experience
- Involved in the award of over $30B of contracts
- Delivered business strategy, technology solutions to the Federal Government and Fortune 500 companies worldwide
- Former V.P of Sales and Marketing for a $300 million integrator.
- Mentored/trained many successful sales executives, project managers, and technical staff
- Active leadership role in industry organizations
- Frequent speaker on federal contracting, business development, and government ethics
AGENDA

- Understanding the Evaluation Process
- Researching and Influence the Opportunity
- Making Effective Go/No-Go Decisions
- Developing a Sound Strategy
- Proposal Development Strategies
- Effective Tools and Writing Techniques
Understanding the Evaluation Process
People Buy From People Who

- They Know
- They Like
- They Trust
WHY IS THIS IMPORTANT FOR CAPTURE?

- What do you know about the evaluator?
  - Technical requirements, internal environment, challenges, objectives and goals, decision makers and their preferences, their contracting history preferences, certification expectations, small business goals, key personnel interests, etc.

- What does the evaluator know about you?
  - Key personnel, past performance, capabilities and experience, innovative solutions, financial capability, commitment to their mission, ideas to support their programs, etc.

- How will the evaluator make their decision?
  - Technical, management, past performance, price, key personnel and staffing, quality management, risk management, technical prototype, orals demonstration, etc.
COMMON EVALUATION TEAM STRUCTURE

Source Selection Authority (SSA) → Source Selection Advisory Council (SSAC) → SSEB Chairperson → Management Team, Technical Team, Price Team, Past Performance Team, Small Business Team

Contracting Officer → Legal Advisor

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Proposal Evaluation - FAR Part 15.305

- Examination of the merits of each proposal against the requirements of the solicitation and evaluation criteria and rating the factors and sub-factors accordingly.
- The relative strengths, deficiencies, significant weaknesses, and risks supporting proposal evaluation shall be documented in the contract file.
- Performed by the Source Selection Evaluation Board (SSEB)
  - Note: A comparison of one offeror’s proposal to another DOES NOT take place during evaluation phase.

Source Selection

- Comparing the evaluated merits of each proposal against those of other proposals using the established weights of the factors and sub-factors, and selecting the proposal judged to represent the “Best Value” to the Government
- Performed by the Source Selection Authority (SSA)
  - Note: The identity of the offerors is unknown to the SSA, so a competitor’s good “reputation” – even if well deserved - is meaningless outside of the stated evaluation criteria.
FAR 15.101 – Best Value Continuum

- Best Value evaluations can be ambiguous - important to understand agency or contracting office tendencies
- Some agencies publish internal guidelines regarding best value determination
- In acquisitions where the requirement is less defined, there is more development work, or there is greater performance risk, technical or past performance considerations may play a dominant role in source selection and best value determination
BEST VALUE EVALUATIONS

**Tradeoff Process (FAR 15.101-1)**

- A tradeoff process may be used when it is in the best interest of the Government to award to other than the lowest priced offer, or other than the highest technically rated offer.
  - Non-Price Factors are weighted relative to price.
  - All evaluation factors and significant subfactors and their relative importance shall be clearly stated in the solicitation.
  - “The solicitation shall state whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.”
  - The perceived benefits of the higher priced proposal shall merit the additional cost, and the rationale for tradeoffs must be documented in the file in accordance with 15.406.
  - Frequently see around a 5-10% price threshold in best value evaluations.
Low Price Technically Acceptable (FAR 15.101-2)

- Appropriate when a best value is expected from the selection of a technically acceptable proposal with the lowest price
  - Should be utilized in instances where the Government is looking to purchase a commoditized product, service, or solution
  - Evaluation factors and significant subfactors shall be set forth in the RFP
  - Past performance need not be an evaluation factor
  - Trade-offs are NOT permitted and proposals are not ranked
- The Technically Acceptable criteria varies greatly depending upon the Government’s discretion
- Because of lack of resources or limited time, many contracts are trending towards LPTA when they should be evaluated as tradeoff
EVALUATION RATING SYSTEMS

<table>
<thead>
<tr>
<th>Color</th>
<th>Rating</th>
<th>Debriefing Definition #1</th>
<th>Debriefing Definition #2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Outstanding</td>
<td>Exceeds requirements with exceptional performance. Little to no doubt that offeror will perform. Very low risk.</td>
<td>Many significant strengths and advantages not offset by any deficiencies or weaknesses.</td>
</tr>
<tr>
<td></td>
<td>Good</td>
<td>Exceeded some requirements with superior features. Little doubt that offeror will perform with low risk.</td>
<td>Several strengths not offset by any deficiencies or significant weaknesses. May have a few minor weaknesses.</td>
</tr>
<tr>
<td></td>
<td>Acceptable</td>
<td>Capable of meeting requirements with average or slightly above average quality. Some doubt exists with low to moderate risk.</td>
<td>Some strengths not offset by any deficiencies or significant weaknesses. Likely to have a few weaknesses.</td>
</tr>
<tr>
<td></td>
<td>Marginal</td>
<td>Proposal Marginally meets requirements. Difficult to ascertain overall quality. Significant doubt exists with moderate to high risk.</td>
<td>Has deficiencies or significant weaknesses due to errors or omissions. Is capable of improvement.</td>
</tr>
<tr>
<td></td>
<td>Unacceptable</td>
<td>Proposal is inadequate and offeror cannot meet requirements. Extremely doubtful with very high risk in offeror performing.</td>
<td>Has many deficiencies due to major errors and omissions. Is not capable of improvement.</td>
</tr>
</tbody>
</table>
# Evaluation Findings Example

**Civilian Scientific and Environmental Contract**

<table>
<thead>
<tr>
<th>Offeror</th>
<th>Relevance Rating</th>
<th>Performance Rating</th>
<th>Level of Confidence (LC)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company 1</td>
<td>Somewhat Relevant</td>
<td>Very Good</td>
<td>Low LC</td>
</tr>
<tr>
<td>Company 2</td>
<td>Highly Relevant</td>
<td>Exceptional</td>
<td>High LC</td>
</tr>
<tr>
<td>Company 3</td>
<td>Very Highly Relevant</td>
<td>Very Good</td>
<td>High LC</td>
</tr>
<tr>
<td>Company 4</td>
<td>Neutral</td>
<td>Neutral</td>
<td>Neutral</td>
</tr>
<tr>
<td>Company 5</td>
<td>Very Highly Relevant</td>
<td>Exceptional</td>
<td>Very High LC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Offeror</th>
<th>Past Performance Level of Confidence</th>
<th>Total Overall Evaluated Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company 1</td>
<td>Low LC</td>
<td>$7,243,604</td>
</tr>
<tr>
<td>Company 2</td>
<td>High LC</td>
<td>$7,682,252</td>
</tr>
<tr>
<td>Company 3</td>
<td>High LC</td>
<td>$8,351,888</td>
</tr>
<tr>
<td>Company 4</td>
<td>Neutral</td>
<td>$8,667,969</td>
</tr>
<tr>
<td>Company 5</td>
<td>Very High LC</td>
<td>$8,093,894</td>
</tr>
<tr>
<td>Government Estimate</td>
<td>Very High LC</td>
<td>$9,500,000</td>
</tr>
</tbody>
</table>
Research and influence the opportunity

- Make effective go/no-go decisions
- Conduct competitive analysis
- Develop a sound strategy
- Assemble a winning team
- Perform price to win analysis
- Support the proposal team
Identifying the customer’s challenges and goals are critical to capture

- List the top challenges as a starting point. The more specific the more effective they are.
  - Used as a basis for developing a win strategy and win themes later in the capture
  - Ensures that all contributors are on the same page with the customer’s key objectives
When identifying a customer’s challenges and goals, minimally determine . . .

- What is their current infrastructure and technology environment?
- What are their preferences in terms of technologies or processes?
- Are they budget constrained or has their funding increased?
- Have you noticed turnover or do they appear short-staffed?
- Do they have too many overlapping systems?
- Are they getting pressure to meet unrealistic deadlines?
- If this is a re-compete contract, what are the key drivers and requirements of the re-compete?
- Who are our anticipated competitors from a contract vehicle perspective?
- Who are the influential people or decision makers?
- What is the overall intended procurement timeline?
Repeated program delivery delays – Accelerate delivery of solutions. Interest in quicker, more agile development efforts.

Reduced budget of 20% over the next three years – Help the agency do more with less.

Slow and highly visible acquisition failures as a result of both poorly defined requirements and poor defined evaluation criteria.

Antiquated and legacy systems have hampered the agency’s ability to retrieve and manipulate data.

Aging legacy applications increase associated sustainment costs – Provide contracting options that allow for innovative technologies to improve efficiencies yet can integrate into existing environment.

Key resources have left over the last 18 months. Need to show stability in staffing and retention strategies.
Consider the following questions, among others; ask them up front:

- Would you consider requiring a response to a Sample Task Order specific to the requirements of the current contract?
- Would you consider having bidders provide a suggested solution with the proposed resources and hours?
- Would you consider allowing past performance as a sub to be considered?
- Will key personnel be a heavily weighted evaluation factor?
- Will the Government be looking for technical innovation?
- Would you increase the small business participation based upon the current contract performance?
- What sort of measures and incentives do you feel worked best for the current contract?
- Would you agree that a 30 day transition from incumbent contractor to new contractor is acceptable?
CALL PLANNING

- The process by which you market, influence, or communicate your value while gathering important information that will support your win strategy.
  - Identify those decision makers, influencers, and those who provide input
  - Identify the issues or hot buttons for those individuals
- The approach you take should elicit feedback and interaction that supports your bid.
  - Present and validate your solution
  - Confirm the actual decision makers
  - Recommend acquisition approaches (instructions and evaluation criteria)
  - Confirm key requirements
  - Identify requirement gaps
  - Gather competitive intelligence
  - Build relationship with the customer
MAKE EFFECTIVE GO/NO-GO DECISIONS

- Make effective go/no-go decisions
- Conduct competitive analysis
- Develop a sound strategy
- Assemble a winning team
- Perform price to win analysis
- Support the proposal team

Research and influence the opportunity
Qualifying an opportunity involves researching and analyzing an opportunity solely on the merits of the opportunity. This should not be confused with analyzing your ability to win.

Qualifying an opportunity involves determining its validity, viability, and value.

There are two stages during which an opportunity should be qualified:

1. Immediately upon identification of the opportunity
2. Immediately upon RFP release (or DRFP release, if possible)

Determine the cost to win the opportunity in relation to the opportunity’s anticipated value to your company.

At these same stages, you should also separately analyze your ability to win.
GO/NO-GO QUESTIONS

1. Do we understand the work?
2. Do we have the capabilities to deliver the work?
3. Do we unquestionably meet all of the contract requirements?
4. Do we have the right people to assist the agency?
5. Do we have any unique competitive strengths as compared to their vehicles?
6. Did we communicate with, market to, or influence the customer in any way?
7. Do we know the customer’s decision makers?
8. Do we know the customer environment?
9. Have we worked with them before?
10. How high is the performance risk if we win this project? (schedule, price, delivery)?
12. What is the opportunity cost in pursuing this contract versus another contract?

13. Does this align with your growth and revenue objectives?

14. Can we afford the time and resources to pursue this opportunity if we lose?

15. Can we afford not to pursue this opportunity?

16. Do we have enough time to prepare something for this agency to consider?

17. Do we know the other contracting vehicles in play and are we able to compete effectively with them?

18. Can we compete effectively on price?
GO/ NO-GO DECISION FORM

- Objective way for decision makers to review an opportunity
- Use this form as early as possible
  - Continue to use it throughout the capture process to show progress
- Assigns scores to key decision criteria
- Key strengths are identified early
- Weaknesses are identified for mitigation
  - A key reason that earlier is better for completion
- Form is designed to give a comprehensive picture towards each opportunity
<table>
<thead>
<tr>
<th>Question</th>
<th>Score/Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>How far in advance did you start preparing your capture?</td>
<td>Upon or after release</td>
</tr>
<tr>
<td></td>
<td>1 month or less prior</td>
</tr>
<tr>
<td></td>
<td>1-3 months prior</td>
</tr>
<tr>
<td></td>
<td>3-6 months prior</td>
</tr>
<tr>
<td></td>
<td>6+ months prior</td>
</tr>
<tr>
<td>Does your company unquestionably meet all of the SOO requirements?</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>About 1/4</td>
</tr>
<tr>
<td></td>
<td>About 1/2</td>
</tr>
<tr>
<td></td>
<td>About 3/4</td>
</tr>
<tr>
<td></td>
<td>All</td>
</tr>
<tr>
<td>Will your team be 100% formed within one month (assuming a November 2013 Final RFP Release)</td>
<td>No, less than 50% formed</td>
</tr>
<tr>
<td></td>
<td>Not sure or only 50%</td>
</tr>
<tr>
<td></td>
<td>About 75%</td>
</tr>
<tr>
<td></td>
<td>All but 1 or 2 companies</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Do you have a strong relationship with the PEO/EIS program or ERP program offices?</td>
<td>No relationship</td>
</tr>
<tr>
<td></td>
<td>Spoken on the phone only</td>
</tr>
<tr>
<td></td>
<td>Average relationship</td>
</tr>
<tr>
<td></td>
<td>Strong relationship due to this opportunity</td>
</tr>
<tr>
<td></td>
<td>Very strong – prior to this opportunity</td>
</tr>
<tr>
<td>What is your track record within Rock Island Arsenal contracting?</td>
<td>Only losses or never bid</td>
</tr>
<tr>
<td></td>
<td>First opportunity pursued</td>
</tr>
<tr>
<td></td>
<td>Mixed</td>
</tr>
<tr>
<td></td>
<td>One major win</td>
</tr>
<tr>
<td></td>
<td>Multiple wins</td>
</tr>
<tr>
<td>What is your track record winning within Army PEO/EIS?</td>
<td>Only losses or never bid</td>
</tr>
<tr>
<td></td>
<td>First opportunity pursued</td>
</tr>
<tr>
<td></td>
<td>Mixed</td>
</tr>
<tr>
<td></td>
<td>One major win</td>
</tr>
<tr>
<td></td>
<td>Multiple wins</td>
</tr>
<tr>
<td>Do you have experience in GCSS, GFEBS, LMP, DIMHRS, or AESIP?</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>Some experience in 1 to 2 programs</td>
</tr>
<tr>
<td></td>
<td>Very strong in 1 to 2 or some exp in more than 2</td>
</tr>
<tr>
<td></td>
<td>Very strong in 2 to 3 or some exp in 4 to 5</td>
</tr>
<tr>
<td></td>
<td>Very strong exp in 4 to 5 programs</td>
</tr>
<tr>
<td>How many prime contracts do you have with ERP implementations?</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>One</td>
</tr>
<tr>
<td></td>
<td>Two</td>
</tr>
<tr>
<td></td>
<td>Three</td>
</tr>
<tr>
<td></td>
<td>Lots to choose from</td>
</tr>
<tr>
<td>Have you performed IV&amp;V on many of your contracts?</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Only 1 to 2 contracts</td>
</tr>
<tr>
<td></td>
<td>We have a few IV&amp;V projects.</td>
</tr>
<tr>
<td></td>
<td>Half of our projects have IV&amp;V</td>
</tr>
<tr>
<td></td>
<td>Most of our projects have IV&amp;V</td>
</tr>
<tr>
<td>Is your company well versed in performance based contracting?</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Very seldom</td>
</tr>
<tr>
<td></td>
<td>Well versed in some aspects</td>
</tr>
<tr>
<td></td>
<td>Have won PBC contracts</td>
</tr>
<tr>
<td></td>
<td>Experts in all facets of PBC</td>
</tr>
<tr>
<td>How confident are you that your company can be price competitive or even lowest price?</td>
<td>Not confident</td>
</tr>
<tr>
<td></td>
<td>Unsure</td>
</tr>
<tr>
<td></td>
<td>Somewhat confident</td>
</tr>
<tr>
<td></td>
<td>Confident</td>
</tr>
<tr>
<td></td>
<td>Very confident</td>
</tr>
<tr>
<td>Do you have the sufficient staff or will you need to hire the staff?</td>
<td>No and we will have issue hiring</td>
</tr>
<tr>
<td></td>
<td>No but will try to hire</td>
</tr>
<tr>
<td></td>
<td>Yes but will need to hire for some pos.</td>
</tr>
<tr>
<td></td>
<td>Yes, have most of staff</td>
</tr>
<tr>
<td></td>
<td>Yes, have all existing staff</td>
</tr>
<tr>
<td>Does your company have a strong track record working with SB?</td>
<td>Not at all</td>
</tr>
<tr>
<td></td>
<td>Very seldom</td>
</tr>
<tr>
<td></td>
<td>Average track record</td>
</tr>
<tr>
<td></td>
<td>Frequently exceed SB Goals</td>
</tr>
<tr>
<td></td>
<td>Always exceed SB goals</td>
</tr>
<tr>
<td>How many companies are pursuing this opportunity? (Single Award)</td>
<td>17+</td>
</tr>
<tr>
<td></td>
<td>14-16</td>
</tr>
<tr>
<td></td>
<td>10-13</td>
</tr>
<tr>
<td></td>
<td>5-9</td>
</tr>
<tr>
<td></td>
<td>1-4</td>
</tr>
<tr>
<td>Totals</td>
<td>Recommendation</td>
</tr>
<tr>
<td>61-70</td>
<td>Definitely bid</td>
</tr>
<tr>
<td>50-60</td>
<td>Bid, but look at ways to strengthen weak areas</td>
</tr>
<tr>
<td>36-49</td>
<td>Consider, but with additional capture work</td>
</tr>
<tr>
<td>25-35</td>
<td>Probably no bid</td>
</tr>
<tr>
<td>14-24</td>
<td>Do not bid</td>
</tr>
</tbody>
</table>
SO WHAT’S OUR GO/NO-GO PROCESS?

Follow these steps:

1. Review any and all available current or prior solicitation criteria

2. Assess win probability based on internal assessment, evaluation of contracting options, and customer knowledge
   a) Assess validity, viability, and value
   b) Walk through go/no-go criteria

3. Evaluate cost and time to pursue relative to ROI

4. Document any obstacles

5. Determine means to overcome obstacles through customer relationship management

6. If unable to overcome obstacles, do not pursue

7. If able to overcome obstacles, pursue client
DEVELOP A SOUND STRATEGY

- Research and influence the opportunity
- Make effective go/no-go decisions
- Conduct competitive analysis
- Develop a sound strategy
- Assemble a winning team
- Perform price to win analysis
- Support the proposal team
WIN STRATEGY DEVELOPMENT

- Approach, capabilities, experience that defines how you will win.
- Meant to encompass all elements of capture that summarizes how your solution and approach meet the customer’s objectives, challenges, and evaluation criteria.
- Involves your ability to meet or exceed all of the stated requirements
- Win theme and solution development can occur simultaneously
- Must-have knowledge includes:
  - Customer’s needs, challenges, requirements, and evaluation criteria
  - Understanding of solution and/or approach
  - Documentation of gaps that exist in approach
Global IT Workforce with proven technical experience across all areas of the Performance Work Statement

Worldwide rapid response staffing including TS/SCI personnel

Demonstrated Army experience managing two contracts of similar size, scope, and complexity

Highly relevant Task Order experience (Global, On-Time, Within Budget) with data rich environments, network management, network defense, and cyber

Past performance of exceeding SB goals and aggressive small business goals for the agency

Creative and flexible global recruiting successes for rapid deployments with aggressive pricing by labor category and sustained retention for task order performance

Over half of team holds quality certifications throughout company including CMMI Level 3, ISO Certification, ITIL, PMP, CCIE

Teamed with largest provider of networking services currently for agency with over $500 million in awarded task orders with no program delays.
The process of creating the actual contracting solution, offering, or select vehicle of choice for customers.

- Developed and detailed when an opportunity is identified
- Based upon the customer’s needs and requirements
- Takes into account future-state requirements as well as current requirements
- Provides timeline of overall solution with milestones and actions
- Documents the themes, benefits, and value-add of overall solution for customer.
**WIN THEMES**

*Ensure They are Meaningful to the Decision Maker*

Ensure the win themes align to the decision maker’s needs and requirements

- A win theme should be written in such a way that an evaluator can give you a “strength” for it
- You need to know your solution before you can develop a win theme
- Ensure the win themes clearly articulate a:
  - High-level feature of your solution
  - Benefit to the customer
  - Discriminator
  - Proof statement
- A win theme is not:
  - “Our services offer the best value to the agency.”
  - “We offer the lowest risk solution to the customer.”
Ensure They are Meaningful to the Evaluator

GOVERNMENT EXAMPLE

**Poor Win Theme:** Team ABC provides the government with a unique and successful recruiting methodology.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
<th>Discriminator</th>
<th>Proof</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract specific recruiters used that have a performance based comp plan</td>
<td>Quicker fill rate for open positions, shortened start-up time, less risk at transition, saves government $</td>
<td>Our assigned contract specific recruiters have never missed a staffing deadline in 10+ years.</td>
<td>On previous contract we achieved a 100% fill rate within required timeframes. 100% of incentive fee received</td>
</tr>
</tbody>
</table>

**Compelling Win Theme:** Team ABC’s innovative recruiting methodology provides for contract-dedicated recruiters that report to the Team ABC PM. Their contract-level knowledge results in a quicker and higher fill-rate for positions, ultimately saving the government time and money. This methodology was successfully used on Contract XXX where our shorter transition time and 100% fill rate resulted in a cost savings of $2 million for Agency YYY
Ensure They are Meaningful to the Evaluator

- Create storyboards or PowerPoint slides highlighting the key areas:
  - Summary of win strategy (Why we will win)
  - Breakout of each individual customer criteria
  - Document SWOT for each sub-factor
  - Highlight examples of past success
  - Identify discriminators for those sub-factors
  - Summarize the theme for that section

- Gaps and weaknesses in your approach may become apparent based on your win theme development.

- Incorporate partners qualifications as needed into the win theme development
<table>
<thead>
<tr>
<th>Task #</th>
<th>Task</th>
<th>Responsibility</th>
<th>Target Comp Date</th>
<th>Actual Comp Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Continue to populate capture plan</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Select potential vendors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Conduct win theme session</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Conduct competitive analysis</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Collect all relevant past performance</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Contact client contacts to discuss oppor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
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Proposal Development Strategies
The goal is to give them what they want, in the order they want it.

- Assesses the customer’s goals and mitigates risk
- Addresses the customer’s requirements
- Reflects that your core competencies meet the requirements, and addresses “hot button” issues
- Effectively communicates to the customer that you understand & have proposed a solution that addresses and fulfills their requirement(s)

Myth: What the Government wants is more important than the stated evaluation criteria
What is a Winning Proposal?

- A winning proposal will be easy to evaluate. Write the proposal to map to the instructions and address the evaluation criteria.

- If there is anything special or unique about your proposal that you the want the government evaluators to know, write it out first.

- Tell the Government what your approach is, tell them how it will be done, and what the benefits and discriminators are.

- Anticipate the competitor win themes

- Demonstrate your approach and solution as the lowest risk provider to meet their requirements. This is done through incorporating relevant experience and past performance examples throughout your proposal.
First Steps and Tools
Before doing anything, read the solicitation cover to cover

- Don’t assume that the only important parts are covered in Sections C, L, and M
- Identify all requirements; contractual, proposal, and other
  - This is the beginning of your compliance checklist and outline
- Identify areas that are unclear, incomplete or perceived impossible
- Develop initial list of questions

Schedule the kick-off meeting. Confirm the attendance and timing with your executive team.

Send the COMPLETE RFP to the team with the expectation that it be read thoroughly prior to the kick-off meeting

Thoroughly review the SOW/PWS/SOO, instructions, and the evaluation factors and they way they are worded.
Create Your Tools

- The fewer tools, the better

- Four primary areas that need to be managed/tracked
  - Proposal Compliance – Ensure you have a chance to win
  - Proposal Schedule – Give your team time to develop the proposal
  - Proposal Responsibilities – Ensure every required part of the proposal is clearly assigned
  - Proposal Progress – Proposal require collaboration and improve in iterations. Make sure you are tracking the process at a very granular level.

- These four areas can be most effectively managed through the use of only three tools
  - Annotated Outline – provides the details of the RFP for compliance
  - Proposal Schedule/Calendar – keeps the team aware of all milestones, review dates
  - Proposal Compliance Matrix – use one spreadsheet that has multiple purposes (compliance matrix, responsibility matrix, progress tracker)

- All information in one place means you can spend more time managing the proposal, not updating different tools
Developing a proposal is like managing any other project – it’s best managed in smaller pieces.

An annotated outline is a hierarchically organized that contains notes stating the instructions, evaluation factors, other pertinent solicitation text, and guidance.

The purpose of your proposal is to answer requirements in the order expected, **NOT** necessarily to tell a story.
Optional, but highly recommended:

- Insert the win themes that have been developed into the appropriate places in the outline.
- Create table “shells” where applicable.
- Determine page targets based on instructions and evaluation criteria.
- Provide as much guidance as you can to the writer.
- Leave an area for you to insert your bullets/narrative.
- Use a highlight tool to highlight the parts of the RFP you have accounted for in the outline to ensure.
Follow a Sequential Writing Process
Use a Sequential Writing Process

The key to successful proposal writing is to follow an organized, sequential process.
Begin all writing in the proposal with BULLETS

- The bullets should come from the solution that was developed by the SMEs
- The bullets should include information gathered from the teaming partners
- Include the “what”, “who”, “when” of the solution
- Bullets should provide statistics and applicable facts (or indicate where they are needed)
- Identify potential areas for graphics and ideas for graphics
- Have bullets for every heading and subheading
- Insert win themes and discriminators into the appropriate sections
In addition to following explicit instructions, the flow of writing should be consistent. For example:

1. **Convey Understanding.** Describe why the requirement is important to the customer. This is a good place to convey “hot buttons”.

2. **Affirm compliance.** Many evaluators are looking for you to state that you will meet (or exceed) the requirement.

3. **Provide Your Approach/Plan.** Describe what the company will do or what the solution is.

4. **Provide Your Capabilities.** What capabilities does the company have in terms of resources, partners, tools, etc.

5. **Demonstrate Feasibility.** Substantiate the claims you have made with proof and examples of success.

We understand.... We will... Here’s how... We can because... As proof...
Make sure your writers understand the following:

- Evaluators frequently work off of a check list when evaluating your proposal. This checklist is developed based on the instructions and the evaluation criteria in the RFP.
- An evaluator will only be reviewing their assigned portion of the proposal.
- For an evaluator to score your proposal above the level for “meets”, they will need to list specific reasons.
- If an evaluator can’t find quickly your answer to an RFP requirement, they most likely won’t keep looking.
- An evaluator does not have to “read” your proposal, they have to “evaluate” your proposal.
In Summary...

- Make sure opportunities align with your strategic plan and core competencies
- Take the time to research each opportunity to gauge your likelihood of win
- Answer the questions, “What do I know about the customer”, “What does the customer know about me”, “How will the customer evaluate”
- Document all customer challenges, goals, and evaluation criteria before pursuing any opportunity. These will act as the basis for your capture and proposal work.
- Get in front of the customer.
- Spend time developing your solution, win strategy and win themes – these should be directly inserted into your proposal.
- Create the outline and do not copy and paste any information (yet!)
- Spend time developing bullets before writing.