



The RFP Response Process from a Proposal Management Point of View



Agenda

- Compliance First Proposals
- Go/No-Go – Bid/No-Bid
- The Proposal Process
- Proposal Management
- Compliance Matrix
- Why Reviews are Ineffective
- Amendments
- Proposal Failures
- What it Takes to Win



Compliance First Proposals

- Proposal management subject matter experts
- In-kind consultant of PTAC
- Shipley (industry standard) and on the job industry trained
- Assist in proposal development and proposal management for state and federal contracting
- Worked with various 8(a), SDB, SDVOSB, ANC, and MBE companies in addition to larges
- Proposal management consulting – kick offs, outlines, compliance matrices, color reviews, compliance reviews, formatting/desktop publishing, grammar/proofing, subcontractor management, writing assignments, writing support, and more
- Additional services offered by Compliance First
 - Human resources
 - Union/CBA negotiations
 - Contracts administration
 - Proposal/bid pricing support
 - Accounting

My goal is to bring total proposal development capabilities to small companies, enabling them to compete on level ground



Go/No-Go (Bid/No-Bid)

Should we peruse this opportunity?

What should we consider?

- Past and present performance (experience)
- Resources
- Teaming
- Customer's requirements
- Schedule
- Probability of win (Pwin)



Some things to consider:

- Is teaming required/available?
- Do we have relevant past performance (as described by the RFP)?
- Have we attended any required pre-proposal meetings (pre-qualified to bid)?
- Do we (or our teammates) have knowledge of customer, and does the customer know us (advantage or insight)?
- Can we be price competitive?
- Do we know what it takes to do the work (staffing, materials, technical understanding)?



The Proposal Process

- By no means do I claim to know it all
- This is not an all-inclusive list, just some highlights:
 - Pre-proposal kickoff
 - Proposal kickoff
 - Proposal development (technical writing)
 - Storyboards, drafts, & color reviews
 - Post proposal activities



The Proposal Process

(Prior to Kickoff)

- 2-3 days for kick of preparation
- Final bid/no-bid decision
- Compliance matrices
- Proposal outline
- Writing assignments
- Handoff from capture/BD to proposal manager



The Proposal Process

(Proposal Kickoff)

- Get the team in one place
- Points of contact
- Writing assignments
- Share win themes and discriminators with team



The Proposal Process

(Storyboards, Drafts, & Reviews)

- Are you developing storyboards/mock-ups?
- Storyboard/Mock-up Review – heading in the right direction? (some call pink team)
- Pink Team Review – 65 – 75%
- Red Team Pens Down 90 - 95%
- Gold Team Review
- White Glove Review



The Proposal Process

(Post Proposal Activities)

- Lessons learned
- Archiving
- Proposal library
 - Past performance
 - Management volumes
 - Technical volumes
 - Graphics



Proposal Management

- In one way or another, proposal management covers all of the previously discussed proposal activities
- The decision to include all or some of those items depends on RFP size
- A proposal manager keeps all these items in line and:
 - Makes sure authors are united
 - Writing to the requirements
 - Meeting deadlines
 - Checking for compliance



Proposal Management

(How to Read an RFP)

Do I have to read the entire thing? Depending on your role, you do, but the main focus should be on the following:

- Most RFPs follow a general structure. The sections that are key to most participants are Instructions, Evaluation Criteria, Scope (statement of work), and pricing requirements.
 - Instructions: Formatting, organizing, and submitting your proposal, past performance requirements, technical focus
 - Evaluation Criteria: How you will be graded
 - Scope/SOW: What it is they want you to propose (PWS)
 - Pricing format: (not covered in this discussion)



How to Read an RFP

(Instructions)

- Instruction items might include:
 - General information
 - Points of contact (contracting/procuring officer)
 - Source selection methodology (grading scale)
 - Page limits (and any exceptions)
 - Page format (margins, font restrictions, graphics requirements, page size, numbering, page layout....)
 - Organization and structure (outline development)
 - Submission requirements (when, where, how many)
- Any additional information that may be available or referenced



How to Read an RFP

(Evaluation Criteria)

- Evaluation criteria might include:
 - Basis for contract award
 - Evaluation factors and subfactors
 - Relative importance (what sections are considered most important and how they are weighted in reference to the remaining sections)
 - Example – Factor 1 (Past Performance) is more important than Factor 2 (Technical)
 - Risk ratings
 - Evaluation by volume



How to Read an RFP

(Scope, Work Description, PWS)

Performance work statement (PWS), statement of work (SOW), statement of objectives (SOO), description of services to be performed:

- While you read this section, keep in mind all the instructions and evaluation criteria you just reviewed in previous sections.
- This section should outline all the work you have to bid to.



Compliance Matrix

- A proposal compliance matrix is the key to clarifying the requirements in a complex RFP
- Creating a compliance matrix should be your first step for creating a proposal outline
- When an RFP is heavy in requirements across multiple sections, a compliance matrix can help you make sure that you don't leave any of the requirements out of your proposal
- **It is a checklist for the entire proposal**



Common Review Mistakes

If you were to ask 10 people to define what a color review is, you would most likely receive 10 different responses. Here are some of the common errors or issues I think should be taken into consideration:

- The goals for the review are not shared
- Reviewers are not given specific directions
- The review does not have any checklists (compliance matrices) or written guidance to remind them of what to look for
- The same people who wrote the proposal are on the review
- The review (red team) is scheduled too late and there is not enough time to act on any suggestions
- Participants are not fully committed to the review
- The reviewers look at the proposal from their own perspective, instead of the customer's perspective



Amendments

(Changes to the RFP)

- Changes to the RFP
- Don't plan on an extension
- Be prepared for an extension
- Don't ship too soon!



Common Proposal Failures

- Starting too late
- Start writing with the intent on improving later
- Present things in an order you consider to make better sense
- Failing to address things in the terms of the evaluation criteria
- Not knowing the customer well enough to give them more than they ask for
- Being non-compliant
- Failing to provide proof of your statements



What it Takes to Win

- Have the capability to bid the work
- Don't try to improve the RFP
- Meet assignment deadlines
- Know the competition and the customer
- Don't compromise on review standards
- Staff the proposal appropriately
- Plan before writing/write to that plan
- Address the evaluation criteria in all sections/subsections
- Don't wait till the final RFP drops



Small Business w/ Limited Resources

What can you do as a small business with limited budget and resources when it comes to development and reviews?

- Take a step back and look at the requirement in the evaluators shoes
- Don't assume you know what the customer wants, stick to the requirements
- Always revisit the requirements after breaks or when starting new sections
- Don't make the assumption the evaluator knows the technical side (consider using an outside resource to confirm you have thoroughly explained your response)
- Stick to what is being asked for



Questions and Open Discussion

Mark Dudley

mark@compliancefirstproposals.com

www.compliancefirstproposals.com

303-520-4382