Project Management for Proposal Managers

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Overview

- It’s not just about getting your proposal out the door
- It’s about responsible use of your company’s B&P budget
- It’s about how to manage proposal development as you would manage any other project
- Presentation topics are aligned to the Project Management Body of Knowledge (PMBOK®) created by the Project Management Institute (PMI)
Proposal Priorities

- As a product development project, proposals have a critical time to market – the submission date!
- Your team’s effort is focused on getting your proposal out the door
- Your company’s effort is focused on efficient use of B&P budget (and winning!)
- How do they know if you are spending your B&P budget wisely?
- How do they know if you have a winning proposal?
What is a Proposal?

- A proposal, per “Project Procurement Management” in the PMBOK, is:
  - “…a seller-prepared document that describes the seller’s ability and willingness to provide the requested product.”

- Buyer is choosing the seller team that will provide the product (or service) at the lowest possible cost/time/performance risk
Proposal Life Cycle – 1

Opportunity Capture Phase

Capture Kickoff
- Competitive Assessment
- Win Strategy
- Price to Win

Plan Capture Campaign
- Schedule Baseline
- Management Baseline
- Technical Baseline
- Cost Baseline

Conceptual Top Down
- Formal Bottoms Up
  - Competitive Assessment
  - Win Strategy
  - Price to Win
  - Approved Baseline

Gold Team Review

Bid?
- Yes
- No
Proposal Life Cycle – 2

Opportunity Proposal Phase

1. Win Strategy/Competitive Assessment
2. Proposal Kickoff
3. Proposal Outline & Compliance Matrix
   - Story Boards
   - Pink Team Review
   - Draft Text
   - Red Team Review
   - Final Text & Print
   - Submit
   - Post Submittal Activities

4. Price to Win, “The Deal” & Final Offer
   - Continuous updates

Continuous updates

WIN!
Systems Engineering Analogy

- RFP [Requirement Specification]
- Proposal Outline [A Specs]
- Module Specs [B Specs]
- Story Conference [SRR]
- Story Maps [Breadboards]
- Story Conference [PDR]
- Mock-ups [Brassboards]
- Pink Team [CDR]
- 1st Draft [Prototype]
- Internal Review
- 2nd Draft [Qual. Model]
- Red Team Review
- Final Draft [Flight Model]
- Production [Manufacture]
- Submission [Deliver]
Proposal Team Organization – 1

- One author for each 15-20 pages
- Do not assign primary author roles to program manager, etc.
Proposal Team Organization – 2

Capture Manager
Oversight, Arbitration, Final Authority

Program Manager
Advocate for a Doable Program
- Technical Cost
- Schedule Risk

Proposal Manager
Advocate for Winning
- Strategy
- Plan
- Discipline
- Focus
- Process
- Schedule
- Products

Chief Engineer
Advocate for Technical Performance
- Minimum requirements compliance
- Meets selected winning price

Dynamic tension helps build in quality
Project Schedule

<table>
<thead>
<tr>
<th>Stage</th>
<th>Days 1 - 7</th>
<th>Days 8 - 14</th>
<th>Days 15 - 21</th>
<th>Days 22 - 28</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Win Strategy</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2. Comp. Assessment</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>4</td>
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<tr>
<td>3. Baselines</td>
<td></td>
<td>3</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>4. Proposal Outline</td>
<td></td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>5. Compliance Matrix</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>6. Story Boards</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Story Conference</td>
<td>3</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Mock-ups</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Pink Team Review</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>10. Drafts</td>
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<td></td>
</tr>
<tr>
<td>11. Red Team Review</td>
<td>1</td>
<td>4</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>12. Final Draft</td>
<td></td>
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<td>1</td>
<td></td>
</tr>
<tr>
<td>13. Final Review</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>14. Final Production</td>
<td></td>
<td></td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>15. Deliver &amp; Submit</td>
<td></td>
<td></td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Completed prior to RFP Release

Example 30-day Schedule
Proposal Cost

- Estimate using a time and material basis
- Create proposal schedule and estimate team size
- Assume 15-20 pages per author
- Assume 55-60 hours per week, per person
- Allow contingency for extra staff needed at the end – you can’t extend the schedule!
- Track cost against budget weekly
Proposal Quality

- Similar to any product, you cannot build quality in at the end!

- Some keys to a high quality proposal:
  - A comprehensive win strategy understood by your entire proposal team
  - An iterative development process with informal (‘wall walks’) and formal reviews
  - Regular team communication
Seven Cs of Quality

- **Compliant**
  - Does it meet all customer requirements?

- **Compelling**
  - Will it make your customer want to buy it?

- **Credible**
  - Could you perform the effort? Do they want you?

- **Correct**
  - Is it accurate?

- **Consistent**
  - Across all deliverables?

- **Concise**
  - Is it brief and to the point?

- **Clear**
  - Will the customer get it?

**Remember:**
- Proposals are scored – not read
- Customers buy benefits – not features
Proposal Communications – 1

- Create (and maintain!) a “Wall of Truth”:
  - Win strategy
  - Baselines
  - Action items
  - Risks
  - Tree of themes
  - Standard terminology
  - Past performance contract references
  - Standard sizes, weights, numbers of things, quantities, etc.
  - Initial acronym list
  - Copy of latest standup charts (schedule), etc.
Proposal Communications – 2a

- Daily Standup Meetings
  - Assemble your entire team
  - Report on schedule, upcoming milestones and meetings, action items
  - Status each module, by volume (see next slide)
  - Status module art, by volume
  - Current news and issues

- Update the ‘Wall of Truth’
## Proposal Communications – 2b

### Typical Volume Status table

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Author</th>
<th>#pp</th>
<th>Story Boards</th>
<th>Mockups</th>
<th>Drafts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Rdy</td>
<td>Rvw</td>
<td>App</td>
</tr>
<tr>
<td>1.0</td>
<td>Introduction</td>
<td>J. Doe</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.0</td>
<td>System Approach</td>
<td>M. Twain</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Key:
- **Rdy** = Ready for review
- **Rvw** = Reviewed
- **App** = Approved
- Red = Late
- Yellow = Due today
- Green = Completed
- Light Green = Being reworked

**Area of Concern!**
Proposal Communications – 3a

- Weekly Status Reports
  - Intended for your senior management
  - Highlights risks, actions to manage risks
  - Report on proposal status (see next slide)
  - Report on proposal financials (expenditure vs. budget)
  - Report on all deliverables (volumes, etc.):
    - Blue – Winning element
    - Green – Responsive but needs improvement
    - Yellow – Having problems but recoverable
    - Red – Management attention required
# Proposal Communications – 3b

<table>
<thead>
<tr>
<th>Item</th>
<th>Status</th>
<th>Trend</th>
<th>Issues and Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Win Strategy Implementation</td>
<td>Blue</td>
<td>➣</td>
<td>Are we experiencing problems implementing our win strategy? What actions are planned to correct problems?</td>
</tr>
<tr>
<td>Proposal Baselines</td>
<td>Green</td>
<td>➣</td>
<td>Are our baselines at appropriate maturity levels needed to support our proposal? Have baselines been reviewed by non-advocates and are they documented on the wall?</td>
</tr>
<tr>
<td>Staffing/Team Performance</td>
<td>Yellow</td>
<td>➣</td>
<td>Do we have the right people? Are there enough authors? Is our team performing well? What actions are planned to correct problems?</td>
</tr>
<tr>
<td>Adherence to Schedule</td>
<td>Green</td>
<td>➣</td>
<td>Is our team meeting deadlines? Is our milestone schedule at risk? What actions are planned to correct problems?</td>
</tr>
<tr>
<td>Proposal Infrastructure</td>
<td>Red</td>
<td>➣</td>
<td>Are there any issues with computers, office space, conference room space, printing capability, and other infrastructure items that are interfering with proposal progress? What actions are planned?</td>
</tr>
</tbody>
</table>

- **Blue** – On track with no issues
- **Green** – Mostly on track, minor issues easily correctable
- **Yellow** – Issues require significant effort to correct
- **Red** – Management attention required

- **Status improving**
- **Status steady**
- **Status degrading**
Proposal Risk – 1

Managing development risks can incur cost and schedule overruns, but with a proposal:
- Cost overrun = BAD
- Schedule overrun = FATAL!
- Proposals are ‘Time-to-Market’ critical

“Better an adequate proposal on time, than a perfect proposal a day too late!”
- Tom Andrew, USAF (retd.), ex-SM&A Proposal Manager
Proposal Risk – 2

- Content Risk – *the product you offer*
  - Strategy
  - Deliverables

- Development Risk – *how you get there*
  - Team
  - Schedule
  - Infrastructure
  - Delivery
Proposal Risk – 3

Proposal Content – Baseline Drift:

- Most proposals require several baselines, e.g. Technical, Management, Cost, Schedule, etc.
- Baseline development is often concurrent with proposal development
- The risk of baseline drift can be avoided with regular, coordinated reviews of each baseline and the proposal content
Proposal Risk – 4

Proposal Development – Team:

- Most team members have a ‘day job’ and some don’t want to work on a proposal
- Collocating your team allows focus, avoids ‘day job’ distractions and promotes communication
- Remove internal walls but put a wall around your team!
- Plan replacements in case of illness
- Plan for extra production during end game
Proposal Risk – 5

- Proposal Team is One Team!
  - Comprises everyone associated with ANY aspect of your proposal
  - Includes Contracts and Finance departments
  - Everyone must participate in reviews, and everything must be reviewed
  - Even Executive Management must honor your proposal schedule!
Proposal Risk – 5

Proposal Development – Protect Production:
• Maintain author ‘pens down’ deadline to give production enough time for integration and printing
• Provide Microsoft® Word training to authors to lessen integration effort
• Manage artwork to avoid time wasted on unused art
• Set author page count limits early
Proposal Risk – 6

Proposal Development – Infrastructure:
- Ensure everyone has a PC and the appropriate software (especially production)
- Ensure work is saved to your proposal server, and regular backups are made
- Ensure you have a document and art configuration management process
- Ensure you have a backup plan for power failure or natural disaster, and for delivery
Summary

- Manage the proposal as you would any other project
- Plan the effort, monitor progress and report status
- Understand the risks and how to manage them
- Use an iterative development process with informal and formal reviews to ensure quality
- Communicate, communicate, communicate!