

# 2018 WEBINAR SERIES



## PROPOSAL EFFICIENCIES *that* **SAVE** **MONEY**



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# Proposal Efficiencies: Webinar Panel



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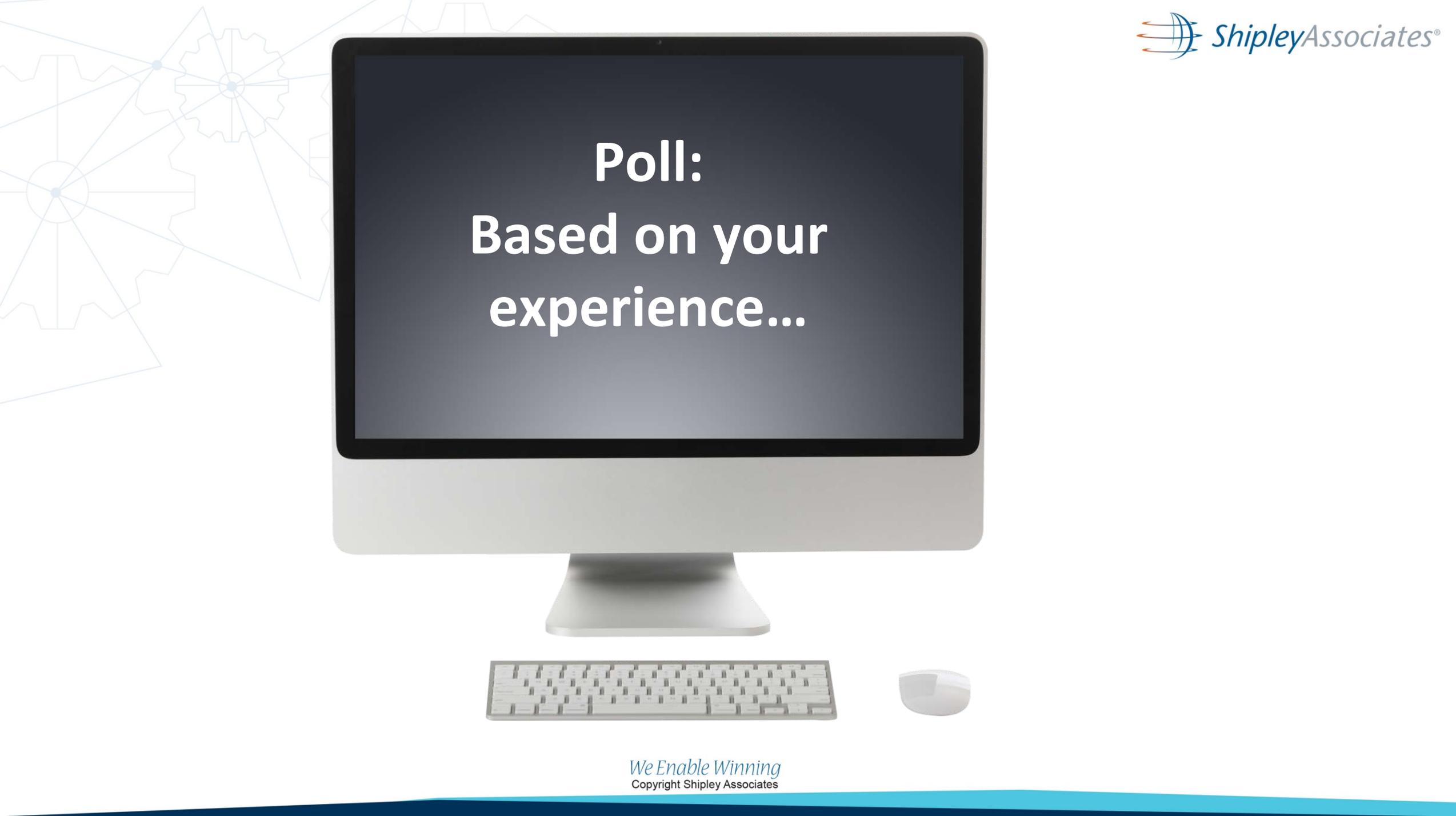
# Webinar Agenda

- Efficiency vs. Efficiency Drains
- Tips for Efficient Proposal Development
  - Know the customer needs and hot buttons
  - Plan and Organize the Proposal
  - Write, Review, and Revise
  - Perfect the Message (15 sure-fire inefficiencies)
- Proposal Reviews and Tools
- Summary

# Your Pre-Webinar Questions

- How to use boilerplate content – tips, traps, and tools
- Can we measure the cost of proposal development (ROI)?
- What is the best way to leverage SMEs?
- How to best working with virtual contributor
- Tips for writing better, faster, more efficiently
- How to use proposal reviews most efficiently
- What to do when leadership jumps in at the last minute)?





**Poll:  
Based on your  
experience...**

# Efficiency vs. Effectiveness

From Dictionary.com:

- **Effective** (*adj.*) *Adequate to accomplish a purpose; producing the intended or expected result.*
- **Efficient** (*adj.*) *Performing or functioning in the **best possible manner** with the **least waste of time and effort**.*

Being effective is about doing the right things, while being **efficient** is about **doing things right**.

## Think About This...

Josh Bernoff wrote a piece for The Daily Beast titled: *Bad Writing Costs Businesses Billions*. The article shares an amazing statistic:

Bad writing is costing American businesses close to \$400 billion every year. That is a staggering number.

Bernoff writes:

*“Think about it. You start your day wading through first-draft emails from colleagues who fail to come to the point. You consume reports that don’t make clear what’s happening or what your management should do about it. The websites, marketing materials (*proposals*), and press releases from your suppliers are *filled with jargon and meaningless superlatives.*”*

# Bernoff References Another Article

## *The High Cost of Poor Writing*

*“American workers spend 22 percent of their work time reading; higher compensated workers read more.*

*According to my analysis, America is spending **6 percent of total wages on time wasted attempting to get meaning out of poorly written material.**”*

# Efficiency Drains

- Misguided win strategy
- False starts
- Poor writing
- “All about us” syndrome
- Re-work
- Poorly done reviews/lack of discipline
- Solution uncertainty or delays
- “Too many cooks in the kitchen”



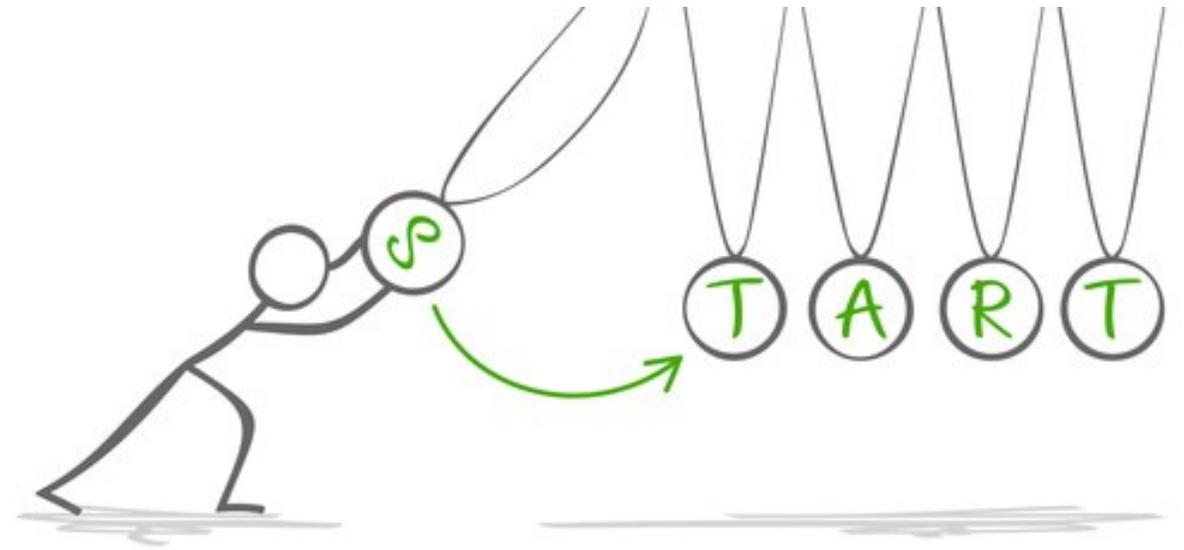
# Can We Measure the Cost of Proposals?

- Fully burdened personnel costs (hours, benefits, fringe)
- Overhead and other costs
- Opportunity costs (replace billable hours)
- Production costs
- Other metrics to track:
  - ✓ Percent of reuse material
  - ✓ Pages per day



# Many Proposal Efficiencies Happen *Before* the Writing

- Kickoff the proposal with a bang
- Plan before you write
- Organize and outline your message
- Draft clear and concise content
- Review and edit for readability and scoreability
- Apply lessons learned from previous proposals



# Kickoff Meetings with a Purpose



# Plan and Conduct Efficient Kickoff Meetings

- ✓ Team introductions
- ✓ Customer briefing
- ✓ Overview of RFP
- ✓ Competitor analysis
- ✓ Solution summary
- ✓ Proposal strategies
- ✓ Schedule
- ✓ Outline
- ✓ Costing approach
- ✓ Color team review plan

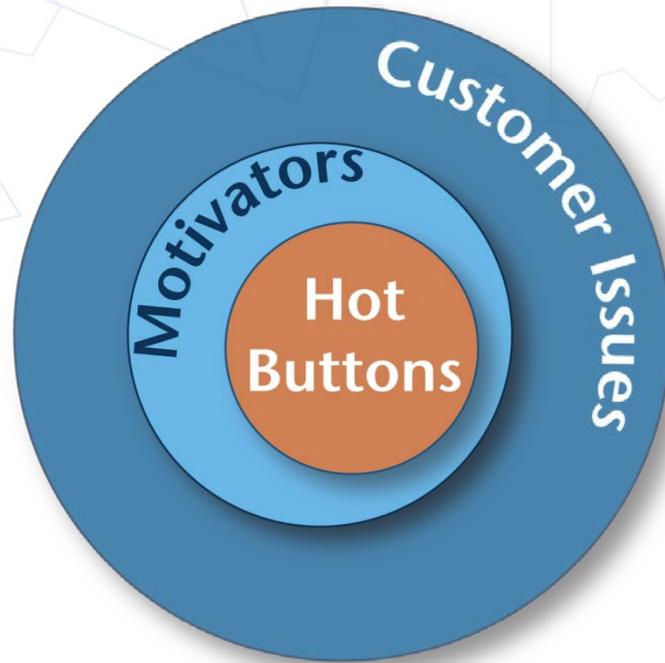
- ✓ Senior managers
- ✓ Capture lead
- ✓ Program manager
- ✓ Volume managers
- ✓ Writers
- ✓ Coordinators
- ✓ Production supervisor
- ✓ Editors and artists
- ✓ Resource managers
- ✓ Teaming partners



- ✓ Daily meeting
- ✓ Storyboarding
- ✓ Mockups
- ✓ Approval process
- ✓ Version control
- ✓ Proposal library
- ✓ Security
- ✓ Data exchange
- ✓ Server access and backup

- ✓ Author assignments
- ✓ Page allocations
- ✓ Proposal style sheet
- ✓ Customer issues
- ✓ Features and benefits
- ✓ Discriminators
- ✓ Writers' standards/guidelines
- ✓ Compliance checklists
- ✓ Guidelines on graphics/ action captions
- ✓ Strategy

# Know the Customer's Issues, Motivators, and Hot Buttons – Before Writing



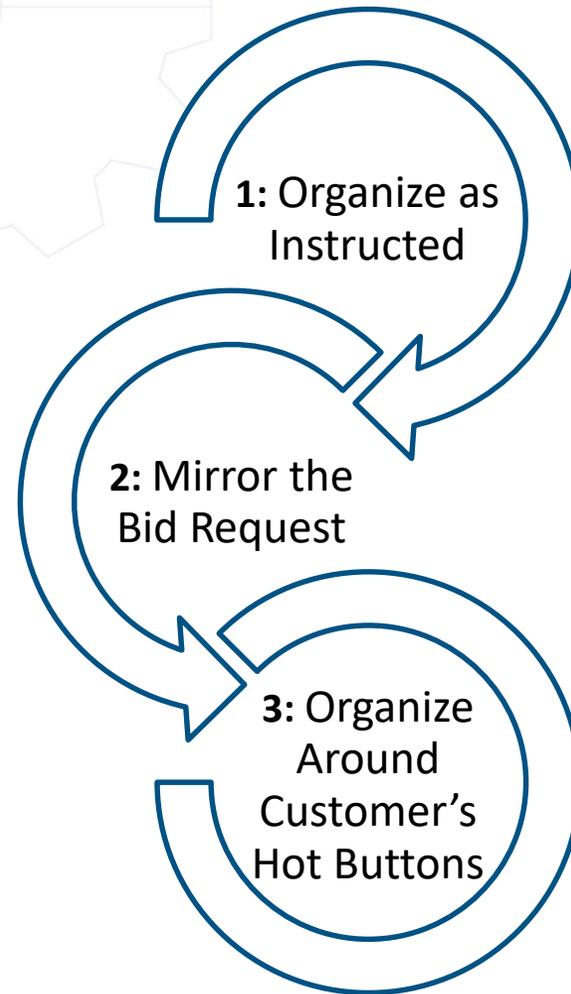
- **Issues** are the customer's concerns. Issues are the *worry items that keep the customer awake at night*.
- **Motivators** are the *objectives that the customer is trying to achieve*.
  - Improve profits
  - Increase sales
  - Reduce costs and redundancy
  - Improve safety
  - Achieve mission – support end user
  - Demonstrate value to taxpayers
- **Hot Buttons** are a *consolidated set of issues and motivators*.

# Tips for Interviewing Subject Matter Experts

1. Be prepared – tailor your discussion based on SME's role
2. Help them understand the requirements and evaluation criteria
3. Make it conversational
4. Move off the solution – it's not about us!
5. Help them focus on benefits
6. Keep lines of communication open – follow-up



# Organize with a Purpose



# Draft Your Content Efficiently

## Write Quickly

- Reduce distractions
- Begin with easiest parts
- Work from the outline/organizer
- Write headings first; use as guide posts
- Keep writing
- Don't worry if draft contains errors

## Use Paragraphs Effectively

- Have only one main idea per paragraph
- Begin with sentence that states main idea
- Organize from general to specific, familiar to unfamiliar, etc.
- Put details in middle of paragraph
- Use transitions to show connections

## Overcome Writer's Block

- Check your Section Planner or Organizer
- Write continuously even if gibberish
- Talk out problem with another writer, manager, or someone you trust
- Change working environment
- Create summaries for each section to clarify thoughts

## Additional Guidelines

- Follow general sequence on each hot button: Benefit, Solution, Proof
- Substantiate claims
- Address weaknesses
- Use lists to clarify and emphasize
- Summarize key content within subsections

# Customer Focused Writing Adds Efficiency

- 01 Is the customer named before us?
- 02 Is the customer named more often than us?
- 03 Is the customer's buying vision (reasons) evident?
- 04 Have we linked the customer's buying vision to our solution?
- 05 Are the customer's hot buttons prioritized?
- 06 Is hot button ownership explicit?
- 07 Are proof statements directly related to customer's hot buttons?
- 08 Are the **benefits** of our solution listed before the features?
- 09 Is the content organized as instructed?
- 10 Is the *value proposition* clear and are next steps defined?

# Boilerplate and Re-Use Material



## Possible Proposal Sections

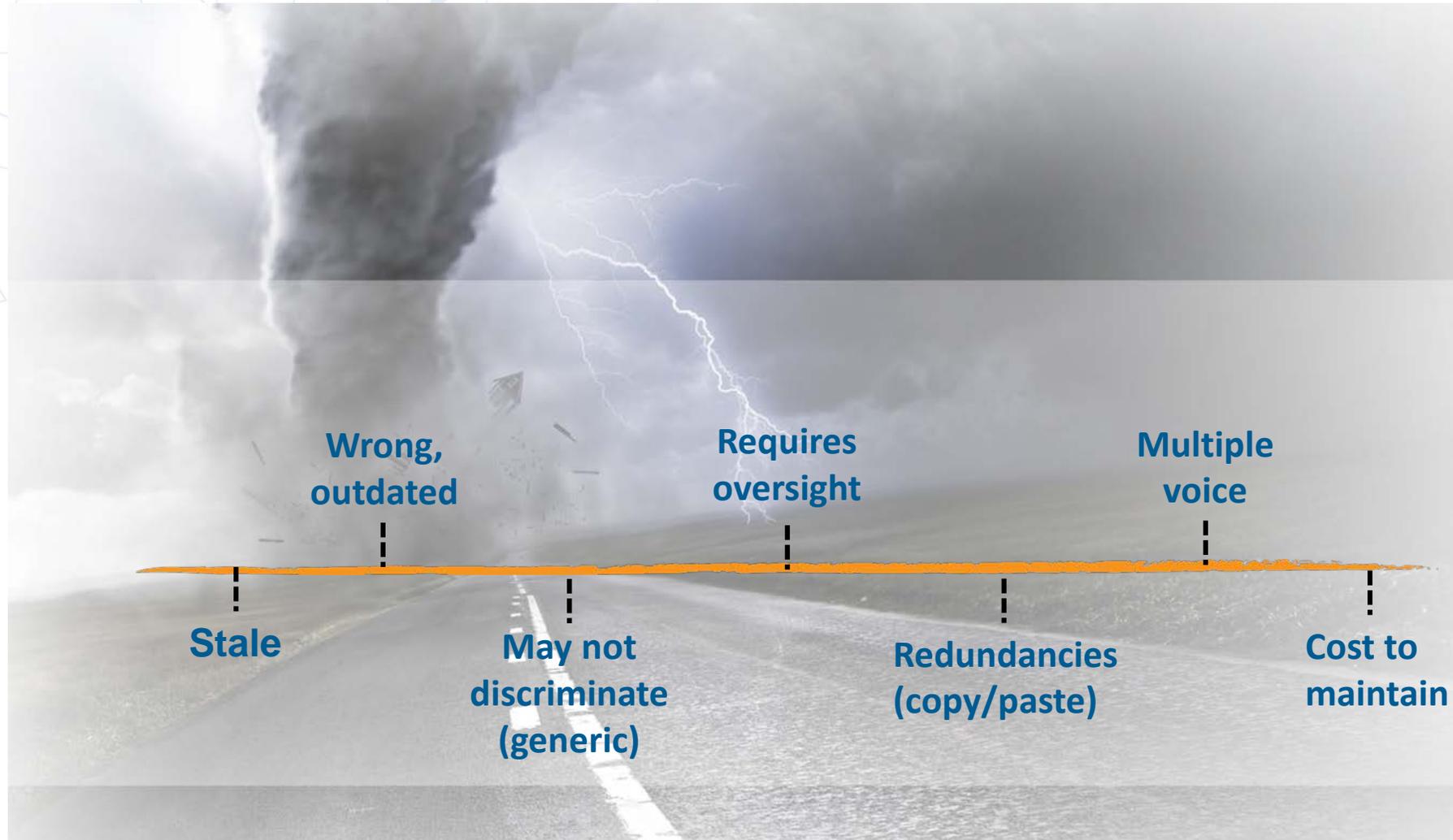
- Transition Approach
- Configuration Management
- Quality Systems
- Key Personnel (Tailored)
- Safety Plan
- Company Background

# Advantages of a Good Boilerplate

- Efficiency (\$ savings)
- Consistency
- Accuracy
- Brainstorming (a place to start)
- Conceptual solution alternatives
- Software and automation can help (requires commitment)



# Disadvantages & Dangers of Boilerplate



# Proposal Reviews Add Efficiency to Process

## PREPARE

- ✓ Plan and schedule
- ✓ Identify members
- ✓ Train reviewers
- ✓ Develop in-briefing

## CONDUCT

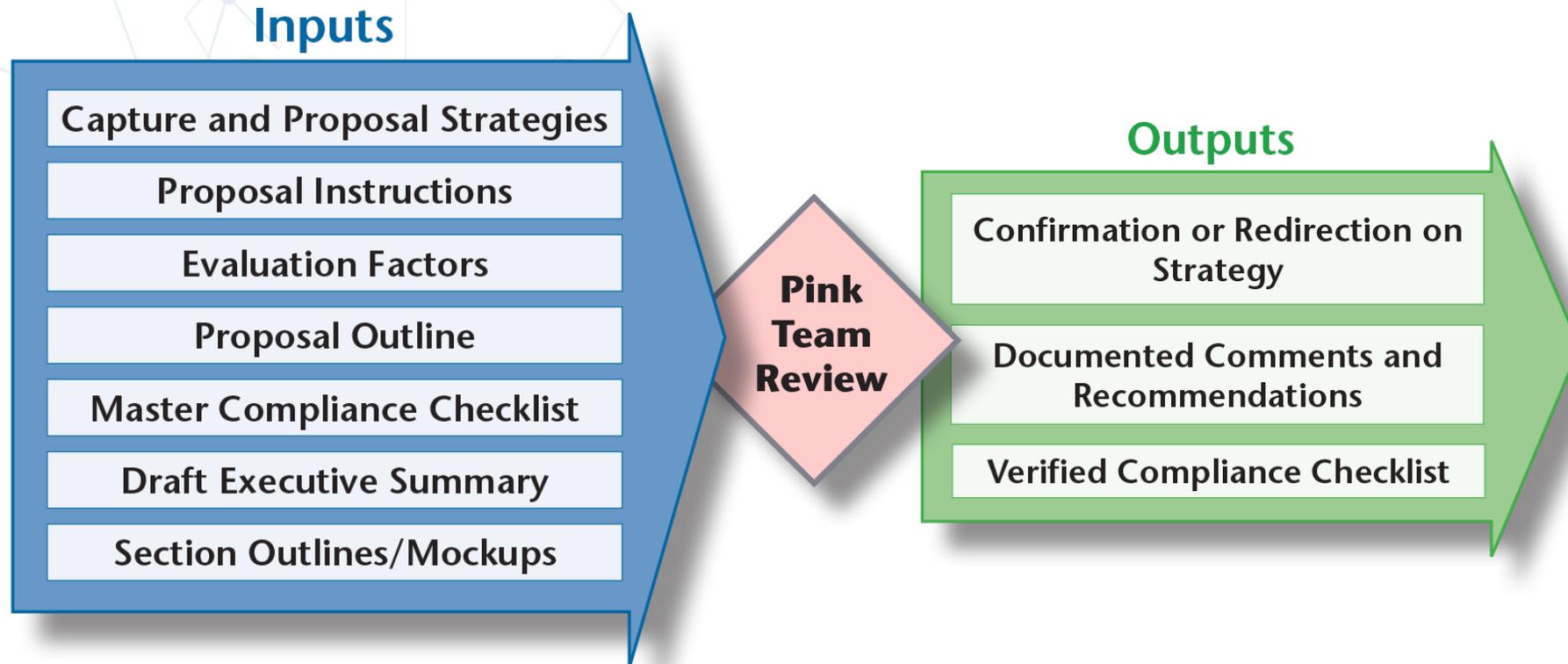
- ✓ Present in-briefing
- ✓ Review individually
- ✓ Discuss as group
- ✓ Report

## RESPOND

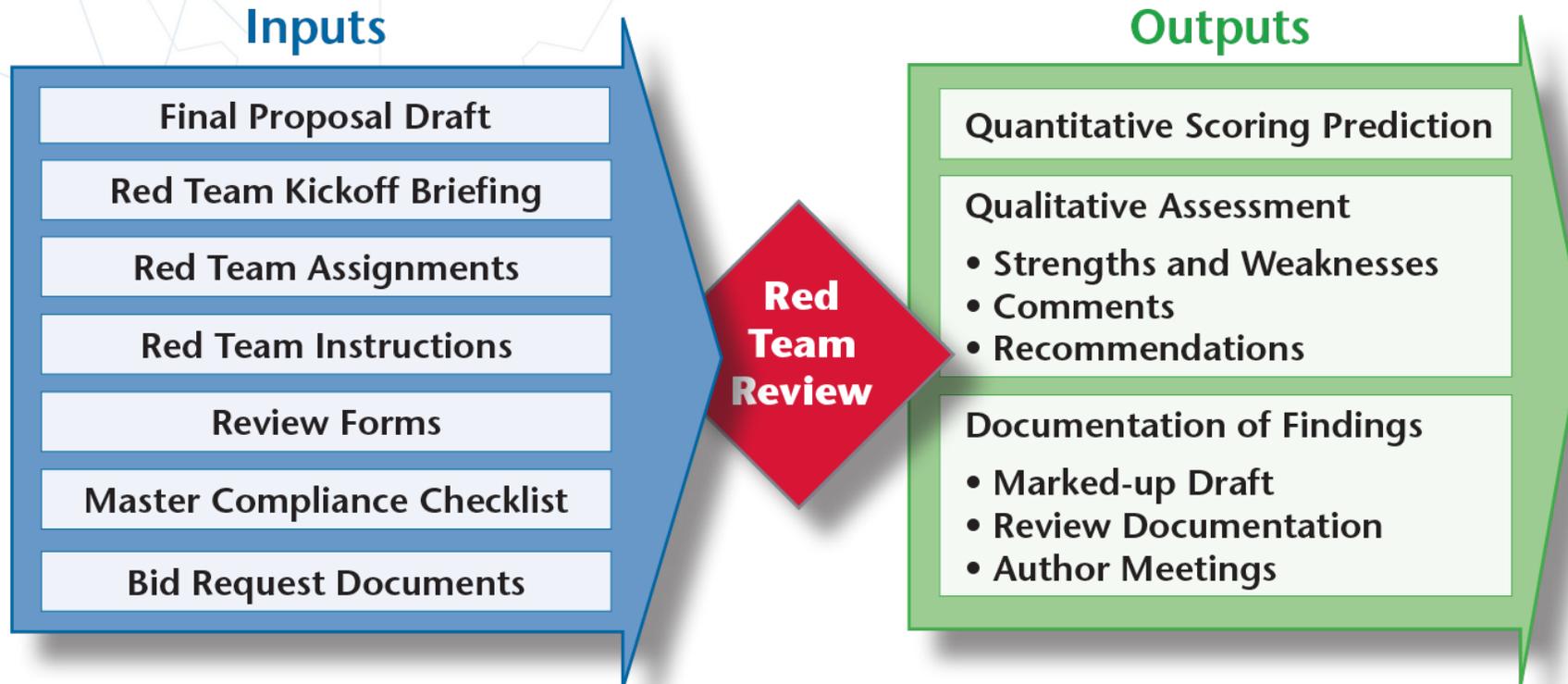
- ✓ Debrief staff
- ✓ Support team
- ✓ Distribute products
- ✓ Archive materials
- ✓ Execute and verify

*Make reviews comprehensive, positive, and constructive.*

# Pink Team Review Inputs and Outputs



# Red Team Inputs and Outputs



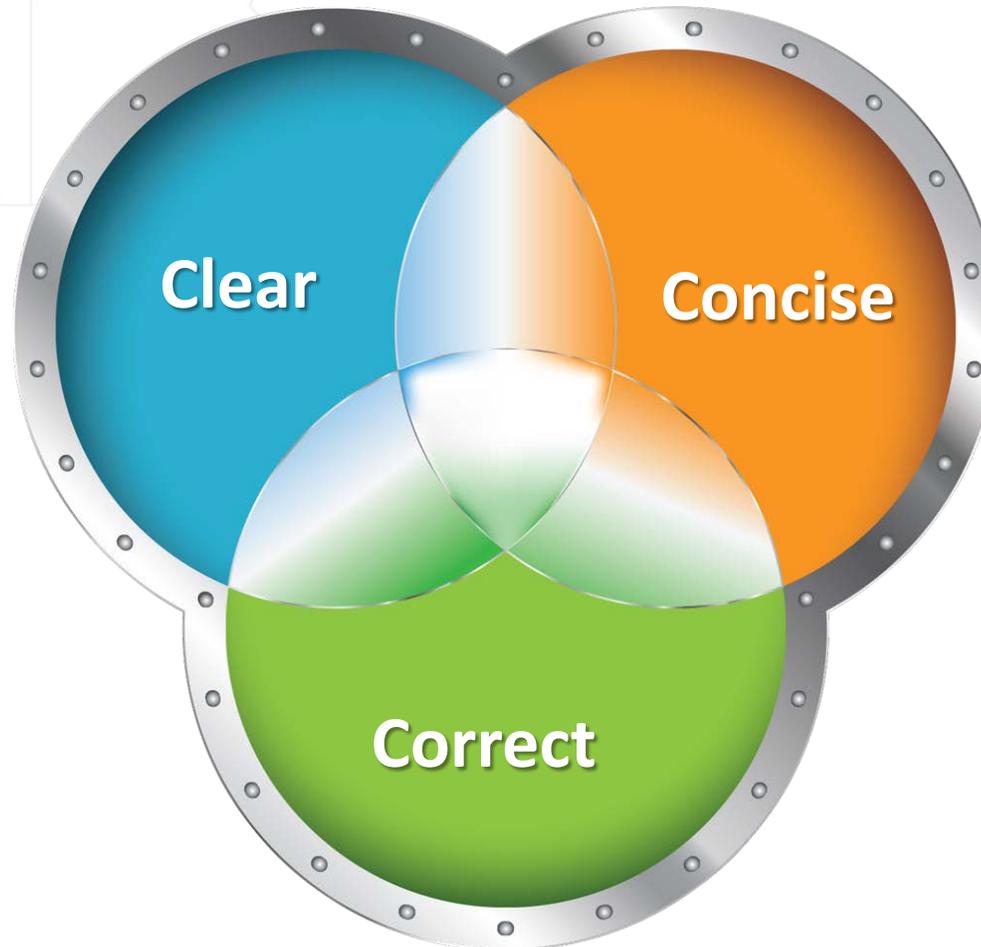
# Automation and Review Tools

 VisibleThread upland Qvidian rfpio Loopio X Solutions Qorus Atebion, LLC RFP 365

123 Proposal Automation Software, Inc.  
\*RFP Stripping, Color Reviewing & Proposal Formatting as easy as 1-2-3\*  
and "editing"

# Review and Revise to Improve Readability

*Paragraphs, Sentences, and Words*



# Revision Stage 1: Be Clear



- Use appropriate headings



- Preview content in each section



- Place important points first



- Keep setups short

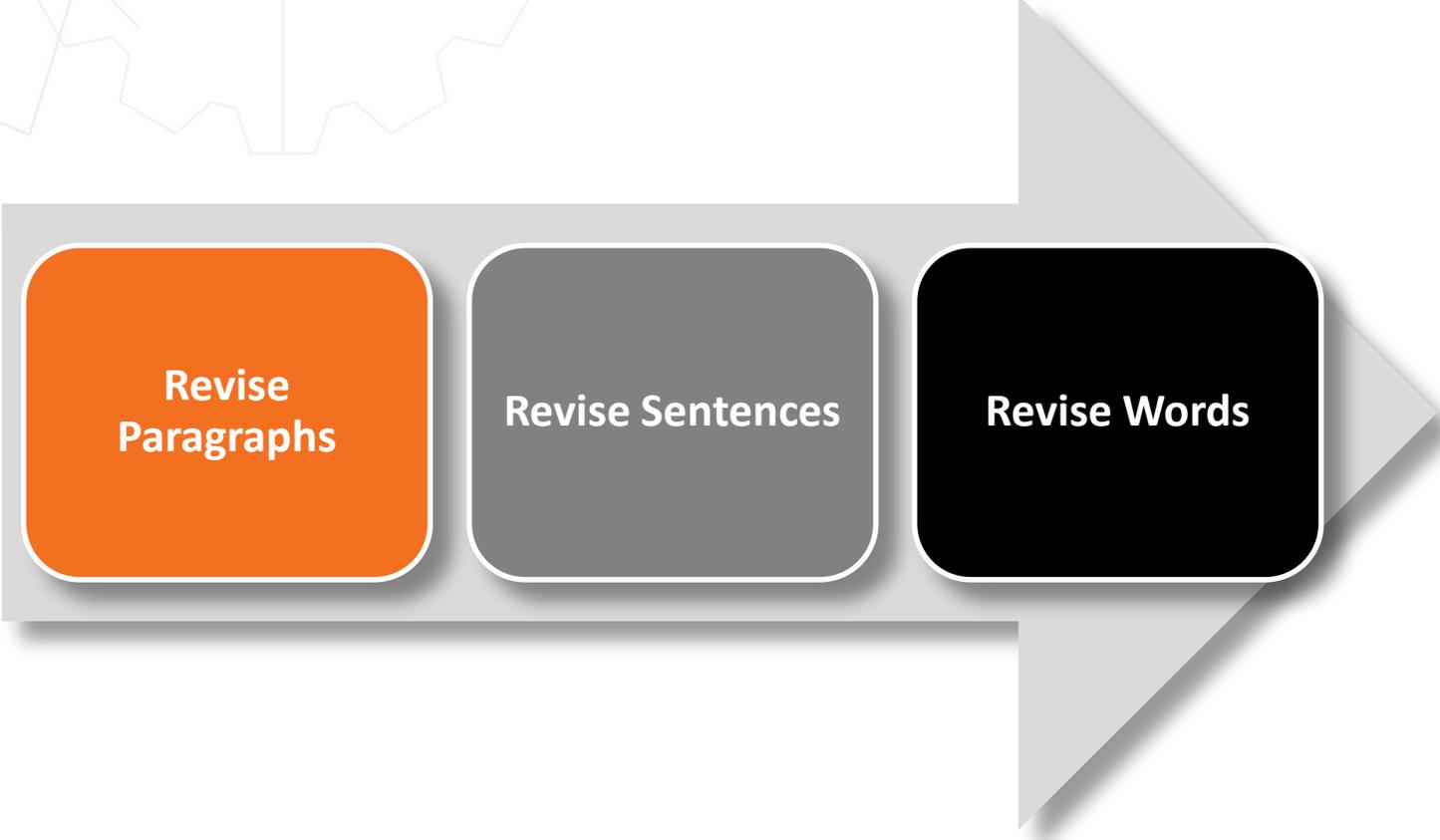


- Emphasize key discriminators



- Create an appropriate tone

# Revision Stage 2: Be Concise



**Revise  
Paragraphs**

**Revise Sentences**

**Revise Words**

# Revision Stage 3: Be Correct

- ✓ Confirm references
- ✓ Check spelling, punctuation, and grammar
- ✓ Resolve word problems
- ✓ Verify consistency with solicitation document
- ✓ Confirm wording and identities (watch acronyms)
- ✓ Double-check numbers and formulas
- ✓ Ensure consistency across sections



# 15 Ways to Be Inefficient in Your Writing

*Use weak verbs:*

01

Jack and Jill went up the hill to get a pail of water.

*Use Unfamiliar words:*

02

Jack and Jill climbed up the hill to fetch a ewer of water.

*Put introductory phrases at the beginning to push the subject back:*

03

To fetch a pail of water, Jack and Jill climbed up the hill.

# 15 Ways to Be Inefficient in Your Writing

***Put the action at the end of the sentence:***

04

Jack and Jill, to fetch a pail of water, climbed up the hill.

***Keep modifiers as far as possible from the words they modify:***

05

Jack and Jill climbed to fetch a pail of water up the hill.

***Use passive voice:***

06

The hill was climbed by Jack and Jill so that a pail of water could be fetched.

# 15 Ways to Be Inefficient in Your Writing

***Put the doer at the end of the sentence:***

07

To fetch a pail of water, the hill was climbed by Jack and Jill.

***Introduce false subjects:***

08

It was Jack and Jill who climbed up the hill to fetch a pail of water.

***Pile on the gobbledegook (fluff):***

09

Jack and Jill ascended the acclivity to retrieve a vessel of Adam's ale.

# 15 Ways to Be Inefficient in Your Writing

*Turn verbs into nouns:*

10

Jack and Jill did the hill climb for purpose of water retrieval.

*Use unnecessary technical jargon:*

11

Jack and Jill traversed the gradient to fetch an alembic vessel of H<sub>2</sub>O.

*Add wordy phrases (fluff):*

12

Jack, in the company of Jill, climbed his way up the hill for the purpose of fetching water in the approximate amount of a pail's full.

# 15 Ways to Be Inefficient in Your Writing

## ***Multiple redundant words:***

13

Both Jack and Jill climbed all the way up to the top of the hill's summit to fetch a pail filled to its capacity with water.

## ***Throw in clichés indiscriminately:***

14

Jack and Jill, who need no introduction, climbed up the hill by leaps and bounds to fetch through their good offices a pail of water by hook or by crook.

## ***String lots of nouns together to form the subject:***

15

Jack and Jill water retrieval hill ascent was achieved.

# Summary

From Dictionary.com:

**Efficient** (*adj.*) – Performing or functioning in the *best possible manner* with the *least waste of time and effort*.

Being effective is about doing the right things, while being **efficient** is about *doing things right*.

**BAD WRITING IS COSTING  
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TO 400 BILLION EVERY YEAR**

# Questions



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## FALL SERIES

- Aug 8** Proposal Efficiencies that Save Money
- Sept 19** 5 Ways to Approach a Win Strategy
- Oct 24** Making Smart Pursuit and Bid Decisions
- Dec 12** Writing to Win

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The graphic features a blue background with a world map and a network of white dots and lines. Two orange arrows point towards the 'Sept 19' webinar entry from the left and right sides.

# 2018 WEBINAR SERIES



## Thank You!



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