7 Characteristics of Effective Proposals

Webinar Presented by:
Callie Apt, Paige Frame, and Brad Douglas
Webinar Overview

1. Overview the best practices for proposal development

2. Review each of the 7 characteristics common to quality proposals

3. Score your own proposals – a checklist and scorecard
How Many Bars do You See?
So What?

- Perception is everything!
- There may be more than one right answer.
- Customer expectations may vary.
- Think like the customer.
Inefficient and ineffective!
Starting sooner = improved quality
<table>
<thead>
<tr>
<th>Years of Assessments</th>
<th>Proposals Assessed</th>
<th>Companies</th>
<th>Countries (and regions) where bids were sent</th>
<th>Hours Expended to Assess Proposals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999-Present</td>
<td>Over 420</td>
<td>Over 110 (B2G, B2B; international, local)</td>
<td>12 (Americas, Europe, Asia-Pacific, Middle East, Africa)</td>
<td>Over 6,400 hours</td>
</tr>
</tbody>
</table>

--- Extract from Proposal Assessment Study
What Benchmark Research Tells Us

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Compliance</td>
<td>6.0</td>
<td>4.04</td>
<td>4.12</td>
<td>3.63</td>
<td>3.95</td>
<td>4.61</td>
<td>4.02</td>
<td>3.87</td>
<td>4.38</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>6.0</td>
<td>3.65</td>
<td>3.65</td>
<td>3.43</td>
<td>3.68</td>
<td>3.81</td>
<td>3.48</td>
<td>3.70</td>
<td>4.27</td>
</tr>
<tr>
<td>Strategy</td>
<td>5.0</td>
<td>3.30</td>
<td>3.53</td>
<td>3.11</td>
<td>3.54</td>
<td>3.17</td>
<td>3.31</td>
<td>3.04</td>
<td>3.52</td>
</tr>
<tr>
<td>Competitive Focus</td>
<td>5.0</td>
<td>2.70</td>
<td>2.85</td>
<td>2.35</td>
<td>2.91</td>
<td>2.58</td>
<td>2.90</td>
<td>2.61</td>
<td>2.78</td>
</tr>
<tr>
<td>Quality of Writing</td>
<td>4.5</td>
<td>3.62</td>
<td>3.70</td>
<td>3.74</td>
<td>3.27</td>
<td>3.65</td>
<td>3.60</td>
<td>3.38</td>
<td>3.83</td>
</tr>
<tr>
<td>Visualization</td>
<td>4.5</td>
<td>3.34</td>
<td>3.75</td>
<td>3.04</td>
<td>3.49</td>
<td>3.29</td>
<td>3.21</td>
<td>2.97</td>
<td>3.67</td>
</tr>
<tr>
<td>Page and Document Design</td>
<td>4.5</td>
<td>3.68</td>
<td>3.86</td>
<td>3.59</td>
<td>4.01</td>
<td>3.55</td>
<td>3.73</td>
<td>3.44</td>
<td>3.75</td>
</tr>
</tbody>
</table>

Benchmark Scoring: 0 – 6 points

**Green:** Met benchmark

**Yellow:** Just short of or at benchmark

**Red:** At risk compared to benchmark

--Extract from Shipley Associates’ Proposal Assessment Study
Examining the 7 Pillars
Pillar 1: Compliance

Have all the bid request requirements and instructions been followed?

4.3.2 Transition Plan & Resources

Outline in general terms how you will commence operations if you are awarded the contract. Provide a high-level schedule showing the timing of transition activities from contract signing through to handover of services delivery. Provide an organization chart for your transition team, identifying roles of key resources. How many of the resources involved during transition will also form part of the ongoing service delivery team? What are their responsibilities in each phase?

How many unique requirements in this paragraph?

<table>
<thead>
<tr>
<th>Reference</th>
<th>Compliance Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.3.2</td>
<td>Outline in general terms how you will commence operations.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>Provide a high-level schedule showing the timing of transition activities from contract signing through to handover of services delivery.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>Provide an organization chart for your transition team.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>Identify roles of key resources on the transition team.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>Identify resources involved during transition that will be part of the ongoing service delivery team.</td>
</tr>
<tr>
<td>4.3.2</td>
<td>Identify responsibilities of transition resources in each phase of the transition.</td>
</tr>
</tbody>
</table>
Pillar 2: Responsiveness

Does the proposal clearly and directly address the customer’s needs?

We provide 24/7 support.

Supplier must provide 24/7 support.

You (customer) benefit from 24/7 support at four locations around the world, in each language required, with a response time of three minutes or less.
Pillar 3: Competitive Focus

Is it obvious why this offer is better than competitor offers?
Competitive Focus Relies on Discriminators

- **Neutral Position**
  - Customer Needs It
  - Competitor Has It
  - We Have It

- **Irrelevant Position**
  - Customer Doesn’t Need It
  - Competitor Has It
  - We Have It

- **Our Weakness**
  - Customer Needs It
  - Competitor Has It
  - We Don’t Have It

- **Our Discriminators**
  - Customer Needs It
  - Competitor Doesn’t Have It
  - We Have It

- **Context**
  - Technology, Industry, Demographics, Regulations

- **Competitor Capabilities**
  - NO!

- **Customer Needs**
  - MAYBE

- **Our Capabilities**
  - YES!

- **We Enable Winning**

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Pillar 4: Strategy

SWOT

Strengths
Positive Discriminators
Potential Positive Discriminators
Opportunities
Competitor Weaknesses

Weaknesses
Negative Discriminators
Potential Negative Discriminators
Threats
Competitor Strengths

We Enable Winning
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Win Strategy Formula

1. Leverage our Strengths
2. Mitigate our Weaknesses & Risks
3. Neutralize our Competitors’ Strengths
4. Exploit our Competitors’ Weaknesses
5. Focus on our Discriminators

WIN!
Pillar 5: Quality of Writing

Is the writing customer focused, well organized, clear, and correct?

- Name the customer as many or more times than the seller.
- Cite benefits before features.
- Tie to customer vision.
Pillar 6: Visualization

Do our graphics clearly communicate major selling points?

Does our caption support our sales message?

Figure 6.5-1. Efficient Account Team Structure. With only three direct reports and co-location with OSG, Ms. Natasha Bevans will focus exclusively on meeting OSG objectives.
Pillar 7: Page and Document Design

Is the proposal professional in appearance and easy to evaluate?

1.0 Approach to Accomplishing Scope of Services

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
<th>Measurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Designing and implementing methodology</td>
<td>* Technical design and presentation</td>
<td>* Workflows that support the design and implementation processes. * Quality standards that are in place and up to date.</td>
</tr>
</tbody>
</table>

Introduction

In this section, we describe our methodology for assisting clients in developing new or improving existing technical proposals and the various elements that support these processes. Following our methodology, we address each of the areas of focus identified in the service description and focus here are relevant to the services we deliver. In our methodology, each of the focus areas describes what we perform as a result of the process improvement project and what will happen as a result of the engagement. Implementation services are covered as part of the service agreement, and we give an overview of the key deliverables of the process. For each project, we are also identifying the appropriate types of training that, if delivered, will result in the necessary skills and capability to meet your desired objectives.

The following attributes highlight our approach to remaining your technical processes:

- Providing a well-defined and field-tested approach—no delays or costs due to consultant unfamiliarity or approach.
- Ensuring facilitation materials based on a fully supported methodology, with structured interview guides, document templates, presentations, and forms that acquire project success.
- Providing experienced consultants with the ability to adapt the methodology to customer preferences and evolving situations.
- Diagnosing before proposing—understanding how and to what extent facilitation.
- Documenting the current process to establish solid baselines before creating the desired process.
- Approaching facilitation sessions with a clear definition of session deliverables, a tutorial if necessary, and a streamlined solution to enhance the time of session participants.
- Ensuring representation and participation of key stakeholders to benefit their insights and to gain buy-in as part of change management.

The objective of this phase is to identify the strengths and weaknesses of your entire life cycle from opportunity identification through contract award. The assessment of technical documents, recent manuals, and key personnel interviews provides insights into our understanding of your processes. The process is particularly true in the early development efforts prior to any specific documentation being released.

Following these initial discussions, Shipley will provide an engagement schedule that outlines engagement milestones and deliverables. An important step in this process is that we agree on how to inform your leadership and to gain their support for the work that we will do.

1.1.1 Conduct Logistics, Coordination, and Kickoff Meetings

In preparation for initiating the assessment, our lead consultant will coordinate with your assignee engagement goals regarding the schedule, agenda, and requirements in order to plan interviews, collect data, and schedule other tasks. The following forms are provided to facilitate a smooth kickoff to the engagement:

- Checklist for a Process Engagement—provides detailed recommendations to add in participant selection, proposal solicitation, and other activities.
- Documentation Assessment Checklist—provides a list of the types of documentation desired to conduct the document review.
- Baseline Calendar—provides a draft schedule of events to initiate the planning process.

Following these initial discussions, we will provide an engagement schedule that outlines engagement milestones and deliverables. An important step in this process is that we agree on how to inform your leadership and to gain their support for the work that we will do.

The primary outcome of the initial assessment will be a written and oral presentation of the findings and recommendations report in a PowerPoint presentation to your senior management. Our goal will be to align the assessment with your initiatives and to ensure those outcomes will contribute substantially to high-value improvements as shown in Figure 1.1.1.1 below.
7 Pillars of Effective Proposals

1. Compliance
2. Responsiveness
3. Competitive Focus
4. Strategy
5. Quality of Writing
6. Visualization
7. Page and Document Design
The 7 Characteristics Checklist

- Be compliant!
- Go beyond requirements – be responsive to needs
- Know the competitive landscape for competitive focus
- Emphasize discriminators – why us!
- Write to evaluators (customer), not yourself
- Make it easy for evaluators to find information
- Maximize visuals and action captions
- Use page design as a discriminator – make it easy to score
- Examine, review, and revise for quality
Questions & Discussion

Thank you!