The RFP is Coming
Webinar Survey

Question: *In 50 words or less, when working a pursuit, what is the most critical thing for the proposal lead to do in advance of a final RFP?*

Sample Responses

- Confirm the availability and competency of all proposal team members.
- Not assume that the RFP won't change drastically. I recently worked a proposal where the RFP did change drastically, from the sections required to the actual requirements. The company I was contracted to was not prepared for that and made the effort more difficult that it had to be.
- Identify committed staff to work the proposal Identify committed and knowledgeable senior staff that will review and provide strategy to make it a winning proposal.
- I would say be familiar with the draft RFP - and Q & A that are released (if any) changes in the final can indicate importance in areas that you might not have realized are important to the customer.
- Review any information gaps about the customer need and try to fill them.
- A gap analysis (showing weighted competence in SOW requirements and past performance proof points) of prime capabilities against RFP requirements to determine if subcontractors are needed. Then the same gap analysis completed for subs to determine viability of pursuit.
- Determine where the client is so far in the process, then use the 96 step process to develop a plan to fill the gaps. After having studied any government draft RFP, industry day, or other relevant material. See where the Customer is on assigning Volume Leads, Tech lead, administration support and proposal center. With draft RFP, develop a proposal schedule, and shred RFP for a requirements matrix.
- Ensure that all the RIGHT resources are going to be available and have a clear plan, which has been shared with those resources.
- It is most critical for the proposal lead to ensure that all appropriate resources are lined up to respond to the RFP. These resources should be subject matter experts and assigned to respond to the sections of the RFP that are aligned to their area of expertise.
- Meet with the Capture Manager to make sure your plans align and that all gaps are covered.
- Get confirmation that senior management is fully on board with the project and is willing to commit all vital resources needed to complete a successful proposal effort.
- Two things really, in my opinion... 1) Have a thorough understanding of the draft RFP so that substantive differences in the final can quickly be identified; and, 2) Have a solid list of questions prepared for senior management review and decision whether to submit to the PKO.
- Familiarize with the capture material.
- understand the evaluation category/criteria/weight find key-person and his hot buttons
- Build story boards based on a draft RFP or prepare storyboards based on either an old relevant RFP or based on "what you know" with themes as the key drivers Agree the solutions' most relevant features based on what you know of the Customer's Hot Buttons.
- Have a Systems Engineer available to help develop the Technical Baseline which leads to a robust WBS, Schedule, and Cost Baseline. They ALL work together. Think of it as a Rosetta Stone. Ultimately, Cost/Schedule mean profit or loss. It's that simple. Good Cost and Schedule alignment are critical.

- Stakeholder engagement (customer & internal) pre-tender
- Create a draft compliance matrix and ensure the company (including any teammates) can cover all aspects being evaluated.
- Have an organized approach to distribute the final RFP to stakeholders. Who gets what on day one? Where do the RFP files go? Who makes the go/no-go decision?
- Win strategy
- Depends on whether or not they have a DRFP. WIth a DRFP, continue to influence the requirements while transitioning into writing mode as that gives you extra time to create winning volumes. Without a DRFP, work with the capture manager to fully define the expected requirements, solutions and strategies and transition those strategies from action oriented (capture phase) to a message that can be used in a proposal. Other things to do: identify proposal team, determine who will participate in pink and red, finalize teaming agreements, and prepare for the bid validation decision and the kick off meeting.
- The most critical thing for the proposal lead to do in advance of a final RFP is reviewing the proposal team qualifications versus the anticipated RFP to make sure that qualified subject matter experts are in place at RFP release.
- Have a good set or win themes, strategies, and baselines approved and in place.
- Discriminator identification. Competitive assessment. Validate the basis of the bid decision. Establish rapport with capture manager, sponsor and senior management
- Get the customer and competitor analysis from the capture manager, especially customer-focused SWOT analysis. Shipley's "bidder comparison chart" is really helpful in this regard.
- Find out the customer's hot buttons!
- If you're coming in hot (i.e. you're new to the project), then the most important thing you can do it to take the time to understand the customer, and the background behind the solicitation.
- Learn the challenges the customer is expecting with the project, develop solutions to address those challenges, and tell the customer how to obtain your solution.
- Transition capture strategy to proposal strategy as part of the capture team.
- Defining potential weaknesses, i.e. poor or lack of past performance, lack of adequate current staff for resume volume, need for a subcontractor/supplier/partner to fill a gap.
- Ensure that an in depth Capture Plan has been executed and with that information, the company has valid, verifiable reasons why they are going after the bid.
- Confirm the proposal team for all volumes and sections! A close 2nd - Set up the proposal collaboration environment (e.g., SharePoint) and give access to all the expected contributors, including reviewers.

The RFP is Coming
Webinar Survey

Question: *What is the one pre-RFP trap to avoid in a proposal effort?*

Sample Responses

- Waiting for the proposal to drop. Prepare as much as possible prior to proposal release. Easier to modify, rather to create.
- Having a proposal team that knows nothing about proposals. For the proposal mentioned above, the company for years never had competition. For the first proposal, they didn't do a compliance matrix but did hire a desktop publisher. They lost the contract for non-compliance. For the second, they did it themselves. They did a compliance matrix; the DTP was in-house and used their style guide that was not compliant with the RFP. No one thought to give her the RFP. They got the contract, but only because their competitor was technically non-compliant. They hired me for the next one. Before going to print/submission they put me on another proposal. Their in-house DTP took over and changed the font and margins. I looked at it out of curiosity and shared with the manager that the proposal was now non-compliant. They fixed it. I don't know if they were awarded the contract.
- Incumbentitis if you are the incumbent
- Over developing the story or innovations before hearing from the customer. It could make your team get married to an idea before it is clarified.
- Assuming that the information you collected 6 months ago is still valid
- Pursuit without proof of viability.
- Waiting until the release of the RFP to get started. It reduces your odds of winning greatly.
- Allowing critical resources to be diverted onto other projects.
- Not including adequate time in the schedule to recover from unforeseen RFP pitfalls.
- If your team writes to the pre-RFP and the final RFP is different, authors often try to force their original response to fit the new requirement. Work the storyboards, but do not commit to writing too soon.
- Make sure management is fully committed to giving the company its "all" when diving into such a project, and not having to find out that the company is just "going through the motions," with the mentality of "Do I have to do anything on this project? No? Then, sure, by all means--let's bid on it!"
- Getting too locked into proposal content based on the draft.
- Put off planning until the RFP hits,
- let competitors influence on the RFP
- Waiting!!!
- Proposals ARE the avenue to winning more Business. In today's world it is so very important that Client Proposal Leadership understand the importance of having "in house folks" AVAILABLE to work the proposal, per the Shipley Method...because it works. Per the Model, plan, prepare, and understand the customer. Follow the process. The TRAP is under estimating the proposal process. It is intense, by design. Do not buy into the idea of short circuiting the process.
- Complacency - low self-awareness of your win strategy. Why the customer will choose you Vs your competitors and what arguments/logic and proofs they will need of those reasons
- Not having an NDA/draft TA in place in advance. (Or not checking the teammates past performance record.)
- Over-preparing. Using a draft RFP or a previous proposal to guide preparation seems like a good idea. It can lead,

however, to missing changes in the final version; assuming the solution should be the same; and over-reliance on boilerplate.

- Putting too much emphasis on "I played golf with the General, this is what's important and what to expect in the RFP".
- Slowing down the train. You've been picking up steam throughout the capture phase, taking a step back while waiting could cause a train wreck in pink or red team. Continue to strength strategies and solutions.
- One pre-RFP trap is over reliance on existing proposal content to satisfy the pending RFP requirements.
- Thinking you know exactly what the customer wants without reading the formal RFP
- Allowing the client to dictate shortcuts to the process.
- Incumbentitis ("Our client loves us, so we are sure to win the re-compete.) versus Non-incumbentitis ("We offer new solutions, so we are sure to win the re-compete.")
- Waiting for the RFP to drop before working on your solution
- Never ever allow yourself to be forced into rushing the effort. Take the time to plan and develop a timeline for the response. A "pants on fire" approach may bring about the appearance of productivity, but can also be very risky and counterproductive.
- Devoting time to an unfunded opportunity.
- Making decisions based on a single source of intelligence
- Procrastination in planning. Much can be done to set yourself up for success even without a final RFP.
- Lack of Capture Intelligence. If a Capture plan is not in place - no bid
- Waiting for the RFP to arrive and not working on the solution - including technical management, past performance, and pricing