



SHIPLEY WEBINAR



BID AND PROPOSAL MANAGEMENT

NITTY GRITTY PROPOSAL SERIES

September 2023

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A Little about Shiple



A global professional services firm

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Nitty Gritty Proposal Series

Bid & Proposal Management



AGENDA

- Common challenges and myths proposal managers face
- Proposal manager roles and responsibilities
- Core competencies
- Tools and application best practices
- Summary
- Q & A

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The Most Common Nitty Gritty Challenge

“The two most difficult aspects of being a bid or proposal manager are:

- Balancing the tactical with the interpersonal; and
- Holding team members accountable.”

Project Skills

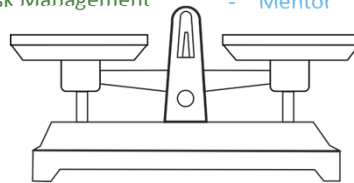
- Data Analysis
- Scheduling
- Budgeting
- Time and Resource Management
- Tech Savvy
- Communication
- Risk Management

Interpersonal

- Active Listener
- Communicator
- Presenter
- Team Builder
- Motivator
- Problem Solver
- Collaborator
- Mentor



Tom Mallott
SVP Business Winning Services, Shiplely



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Other Bid & Proposal Management Challenges

The survey said....



Source:
2023 survey of 177 active bid or proposal management practitioners.



Common Bid & Proposal Myths

Myth #1
Bid & proposal managers must use the entire page count limit when writing a page-limited proposal.

Myth #2
Executive summaries should be written by the proposal manager when the proposal is almost finished.

Myth #3
Proposal managers should avoid writing content at all costs.

Myth #4
As long as we answer the requirements, our proposal has a good chance of winning.



Common Proposal Management Myths

Myth #5

We should not review progress until the scheduled milestone team review.

Myth #6

Engineers and technical SMEs generally have little to contribute to a compelling proposal.
AI can replace most of their writing.

Myth #7

We should limit graphics in proposals because they distract the flow of the message.

Myth #8

Reviewers and evaluators will overlook simple spelling or grammar errors in a proposal.

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Common Proposal Manager Responsibilities

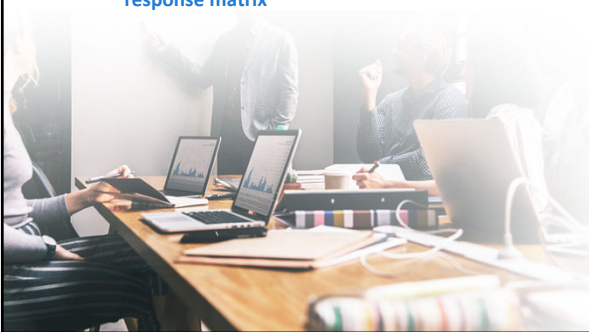
PRIMARY RESPONSIBILITIES

- Understand the capture strategy, including:
 - Competitors
 - Customer needs
 - Solution and benefits
- Form a proposal team—define roles
- Thoroughly assess RFP/RFI (solicitation)
- Create and manage a **compliance and response matrix**

- Create and manage a proposal **schedule**
- Facilitate **daily** status meetings
- Interface with sales/capture lead
- Conduct and execute proposal reviews
- Manage content plan, outlines, and mockup process
- Create writers' packages and make assignments
- Manage AI usage and policy

SECONDARY RESPONSIBILITIES

- Train proposal contributors on best practices and expectations
- **Assist and coach** writers with content development
- Collaborate on proposal graphics
- Ensure price, management, and technical volumes are consistent
- Keep leadership well informed
- Prepare for orals or other follow-on activities



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Bid & Proposal Manager Core Competencies



Source:
APMP.org and APMP Body of Knowledge



Competency *Information Gathering & Sales Orientation*



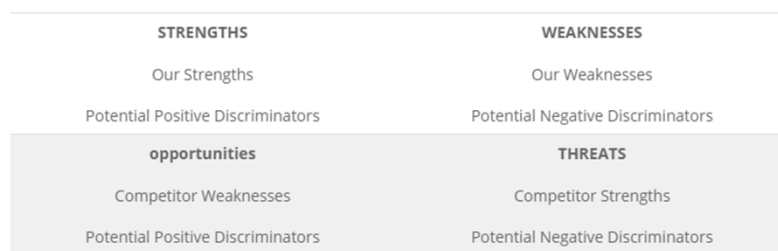
A bid or proposal manager is expected to gather and assimilate information from a variety of sources, including a capture plan.



Gather and Assimilate Intelligence

Create a plan for **gathering** and **assimilating** information

- Be aware of customer insights and hot buttons
- Know the customer’s perception of your company and competitors—SWOT
- Understand your solution, benefits, and discriminators



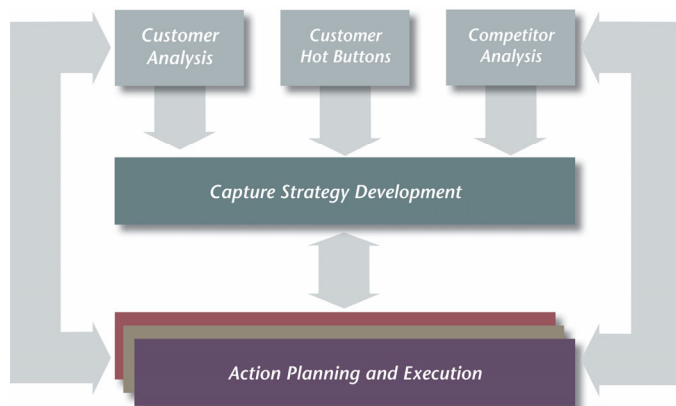
Source: APMP Body of Knowledge (BOK) and Shipley Proposal Guide

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Leverage Key Intelligence and Information



A bid or proposal manager should:

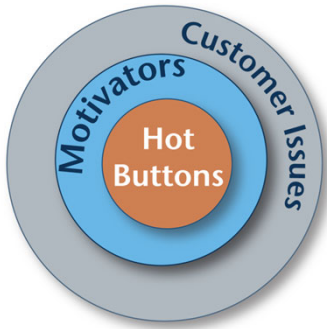
- Evaluate and look for gaps in information
- Be active in information analysis
- Apply analysis into proposal strategy and messaging

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Know the Customer Primary Issues and Goals

- Who is the customer—who makes the decisions?
- What do we know about the customer?
- What does the customer need to achieve success?
- What is affecting the customer—their environment?
- What are the customer’s key concerns (hot buttons)?
- Do you know the customer’s important decision dates?

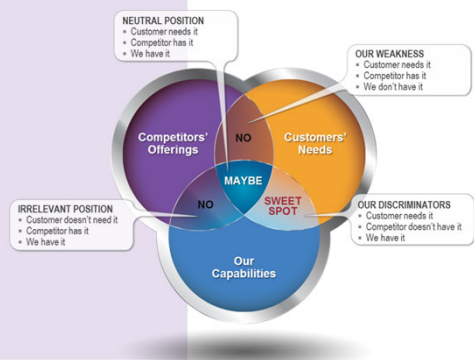


If you don't know, ask.

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Know the Win Strategy

- Align the intelligence with the win strategy
- Continually review the win strategy to reflect any changing circumstances
- Maintain a customer focus at each phase of development
- Understand benefits, features, and discriminators



Source: APMP Body of Knowledge (BOK) and Shiplely Proposal Guide

Focus on the customer!

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Competency

Bid & Proposal Planning



*Significant planning starts well before a final bid request or RFP is released.
Plan early in the opportunity lifecycle!*

Establish a Proposal Management Plan/Playbook

The purpose of the PMP

- Provides the proposal team with the big picture
- Keeps management and contributors informed of progress
- Conveys and manages tasks, expectations, and quality standards
- Provides consistent information and strategies to entire team
- Reduces redundancy and waste—no false starts



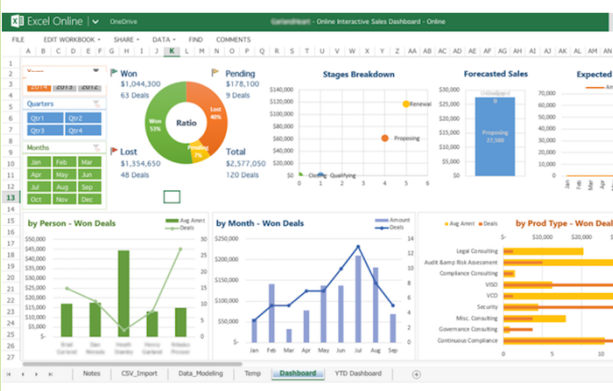
Keep the PMP current and complete.

PMP Fundamental Information

Fit the playbook to your environment



- Customer profile and key issues (big picture – opportunity potential)
- Competitive assessment
- Staffing roles and responsibilities
- Defined proposal operations
- Type of contract
- Printer information and locations
- Building/room security restrictions

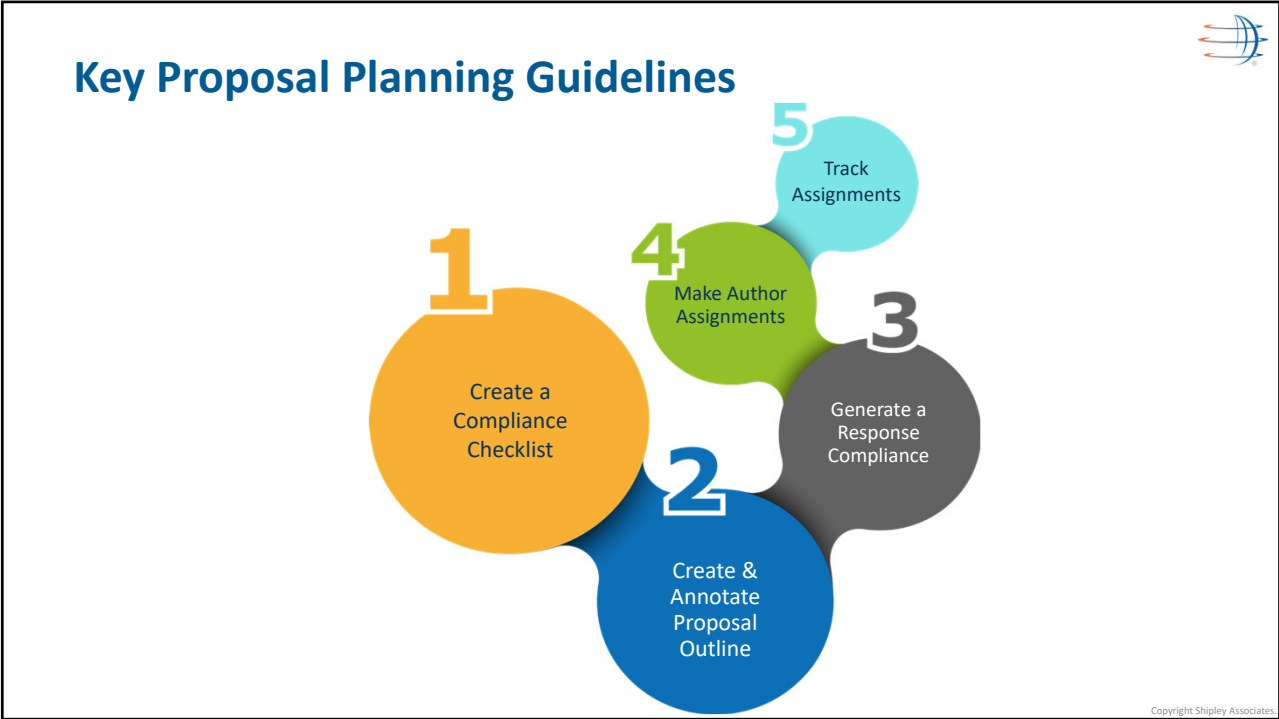


The Proposal Manager Playbook Includes:



1. Compliance matrix
2. Proposal schedule
3. Proposal outline and content plan
4. Writers' information packet
5. Proposal strategies and themes
6. Draft executive summary
7. Team roles and contact directory
8. File management approach





Competency

Bid & Proposal Team Management

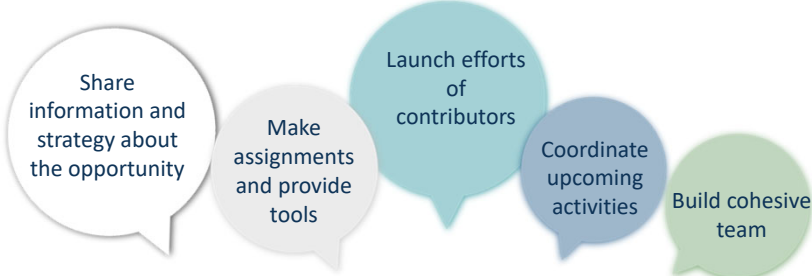
Learning to manage a diverse team and hold them accountable is a significant challenge. Gain trust early.

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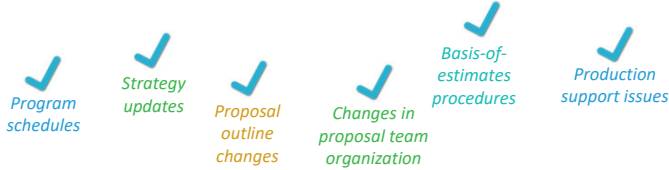
Proposal Kickoff

Establish a Pattern of Leadership and Accountability



Stay Connected Early and Often

Be nimble by holding daily/regular status meetings and huddles – re-direct, as needed



Characteristics

- Be consistent
- Brief the schedule
- Hold at regular time
- Define the agenda
- Consider mandatory participation
- Invite entire team
- Hold sub-team sessions
- Identify problems
- Agree upon action items

Staying Connected (cont.)

Upcoming milestones
 Action items
 Changes in procedures
 Discussions with the customer (upcoming amendments)
 Teaming problems or resolutions
 Design considerations
 Subcontract decisions
 Program management organizational issues

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Daily (Regular) Standup Checks

Daily/regular stand-ups (status checks) occur between key milestone reviews

- Keep check-ins short but be thorough
- Review assigned tasks, commitments, and status
- Identify any issues or “blockers”
- Determine path forward and schedule
 - Need for SME support
 - Reuse or AI material
- Establish commitments and deadlines
- Collaborate, as needed
- Prepare for any upcoming milestone review

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Approach Individual and Team Reviews Consistently

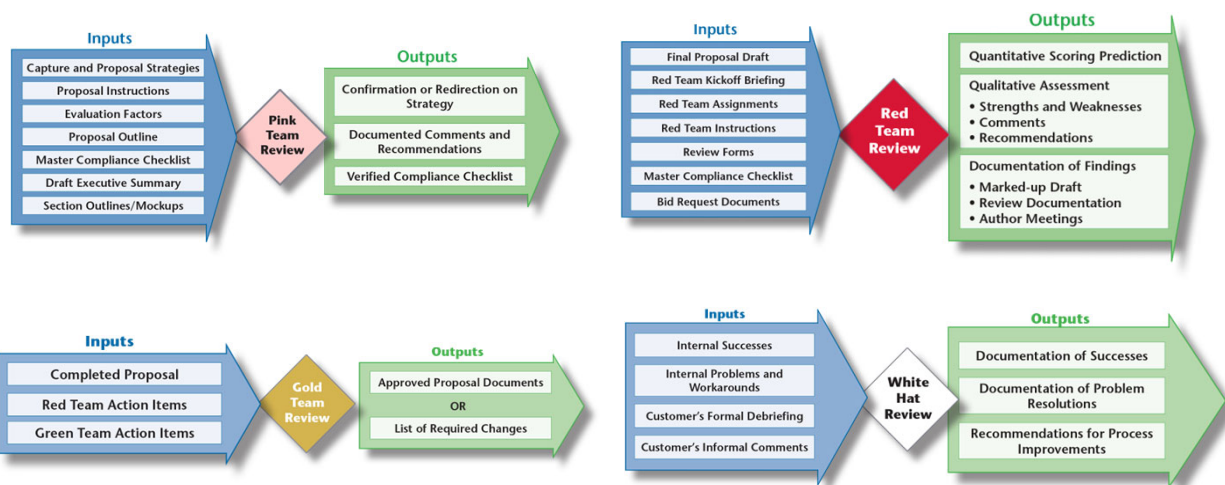


- | | | |
|-----------------------|-----------------------|-----------------------|
| ✓ Plan and schedule | ✓ Present in-briefing | ✓ Debrief staff |
| ✓ Identify members | ✓ Review individually | ✓ Support team |
| ✓ Train reviewers | ✓ Discuss as group | ✓ Distribute products |
| ✓ Develop in-briefing | ✓ Report | ✓ Archive materials |
| | | ✓ Execute and verify |

Make reviews comprehensive, positive, and constructive.



Facilitate Necessary (tailored) Team Reviews





Competency

Leadership & Interpersonal Attributes



Bid and proposal managers must lead, not just manage. Be part of the team; delegate; stay engaged.



Lead a Culture of Accountability

- Clearly define results
- Create alignment around those results
- Instill accountability needed to deliver those results
- Sustain necessary change





Manage Accountability

“Creating accountability requires that doing the job and delivering the result are one in the same. Creating accountability means the job is not done until the result is achieved.”



Source:
*Achieving Results through
Greater Accountability* pg 3

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Recognize & Reward Good Performance

- Recognize good performance in daily/status meetings
 - Core team
 - Ad hoc/external and SME contributors
- Recognition can be more effective than monetary rewards
- Build a spirit of transparency and common goals
- Thank good performers in writing/email and in public
- Hold a win party upon timely submittal and award



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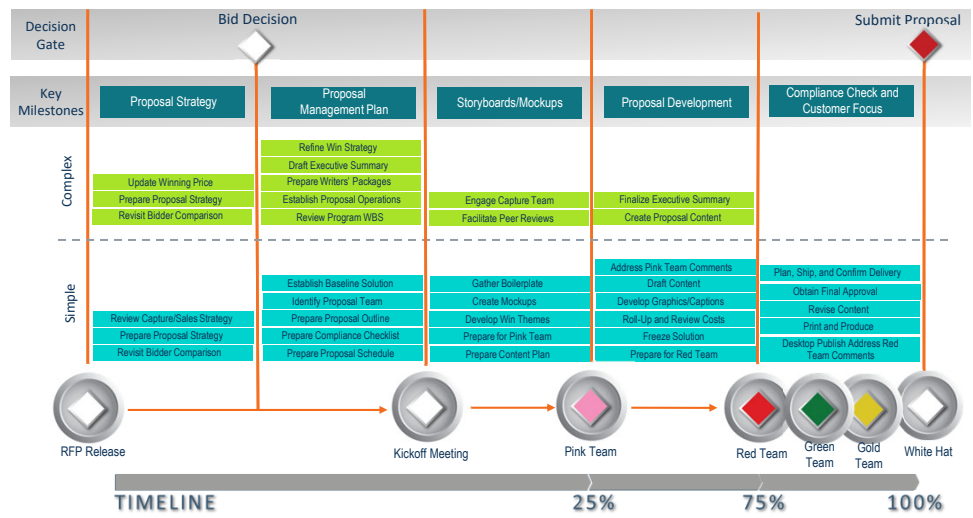
Webinar Summary

Nitty Gritty Proposal Management Best Practices



Balancing people, process, and strategy is key to successful proposal management.

Tailor a Proposal Manager Roadmap that Works for You



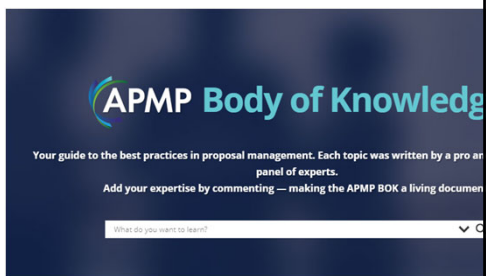
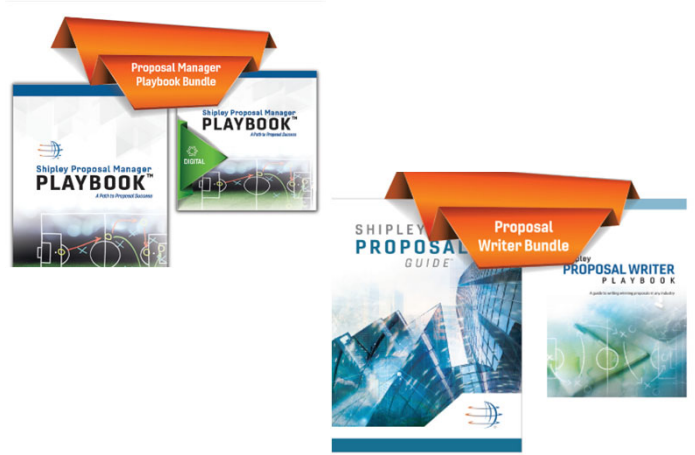


When Time is Short & Resources Scarce

- Thoroughly **read** the entire solicitation
- Create a compliance matrix
- Develop an outline
- Establish and review win themes (pink team)
- Develop response (draft content)
- Review final content (red team)
- Revise for customer focus
- Secure final approval
- Submit with confidence
- Conduct lessons learned / win-loss



Additional Resources



the APMP BOK


encompasses 51 topics organized into seven categories. There's also a full-text search capability, a [glossary](#), a list of [acronyms](#), and a [FAQ](#). We're committed to help evolve a topic's content by providing feedback in the form of comments. To learn more about the APMP BOK, please go to [About the APMP BOK](#). Topics that are not indented are part of the APMP Foundation Study Guide.




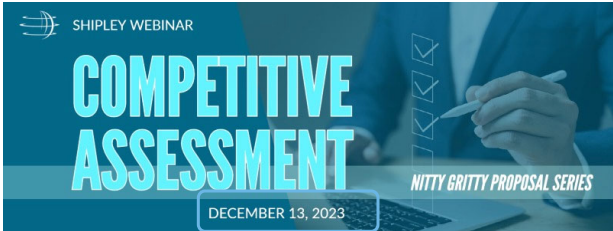

Questions and Discussion

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