SHIPLEY WEBINAR

APMP
Approved Training Organization

NITTY GRITTY PROPOSAL SERIES

SCORE HIGHER
THROUGH READABILITY AND CUSTOMER FOCUS

Facilitated by:

ShipleyAssociates®

Mallary Price
Marketing & Training Coordinator

Brad Douglas
EVP Shipley

Paige Frame, MBA
President McKinnon-Mulherin

McKINNON-MULHERIN
THE WRITE STAFF

Kelson Forsgren
EVP Shipley

Nitty Gritty Proposal Series

Webinar Agenda

- How are proposals really scored

- Evaluation scores and readability
  - Relationships, trust, & credibility matter
  - Customer focus
  - 4 Cs
  - Making it easy
  - MS Office tools

- Q & A

Poll Question

What are the greatest "speed bumps" that proposal evaluators cite when evaluating a response? Answer two.

How are Proposals Really Scored

❶ *Formal, regulated methods for evaluation and scoring*

❷ *Informal methods and approaches for evaluating bids or proposals*
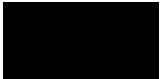
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Proposals are Scored by Humans

Evaluators have preferences, biases, and feelings

50-60% INTO SALES CYCLE **BEFORE** SALESPERSON IS ENGAGED

20x MORE DATA THAN **5yrs** AGO

BUYERS ARE BETTER INFORMED

SELLERS MUST ADJUST **HOW** THEY SELL, NOT JUST **WHAT** THEY SELL

FAILURE IF THEY DON"T ADAPT

Source: Huthwaite Research, Harvard Business Review

Many Scoring Systems Can Be Used

NUMERICAL	ADJECTIVAL	COLOR	ORDINAL
10 9 8	Outstanding	⬛	1st
7 6 5	Good	🟩	2nd
4 3	Marginal	🟧	3rd
2 1 0	Unsatisfactory	🟥	4th

Source: FAR 15.305(a)

The Sad Reality of *Evaluation Column Fodder*

Requirements	A	B	C	D	E
		?	?		Huh?

Formal, Regulated Evaluation Methods

- 🔍 Methods vary by country, agency, local policies

- 🔍 Well-defined, detailed rules and guidelines

- 🔍 Compliance vs compelling
  - ▪ Answer the mail
  - ▪ Be persuasive

Only "a few" Regulations to Consider with U.S. Federal

ACQUISITION.GOV   Data Initiatives   Regulations ▾   Tools ▾   Policy Network ▾   🔍

Regulations

|		
FAR Federal Acquisition Regulation	**NMCARS** Navy Marine Corps Acquisition Regulation Supplement	**DOSAR** Department of State Acquisition Regulation	**HUDAR** Housing and Urban Development Acquisition Regulation
Chapter 99 (CAS) CFR Title 48 Chapter 99	**SOFARS** Special Operations Federal Acquisition Regulations Supplement	**DTAR** Department of Treasury Acquisition Regulation	**IAAR** Broadcasting Board of Governors Acquisition Regulation
DFARS Defense Federal Acquisition Regulation Supplement	**TRANSFARS** Transportation Federal Acquisition Regulation Supplement	**EDAR** Department of Education Acquisition Regulation	**JAR** Justice Acquisition Regulation
DFARSPGI Defense Federal Acquisition Regulation Supplement PGI	**AGAR** Agriculture Acquisition Regulation	**EPAAR** Environmental Protection Agency Acquisition Regulation	**LIFAR** Life Insurance Federal Acquisition Regulations
AFARS Army Federal Acquisition Regulation Supplement	**AIDAR** USAID Acquisition Regulation	**FEHBAR** Federal Employee Health Benefits Acquisition Regulation	**NFS** NASA Federal Acquisition Regulation Supplement

Example of Complex Evaluation Team
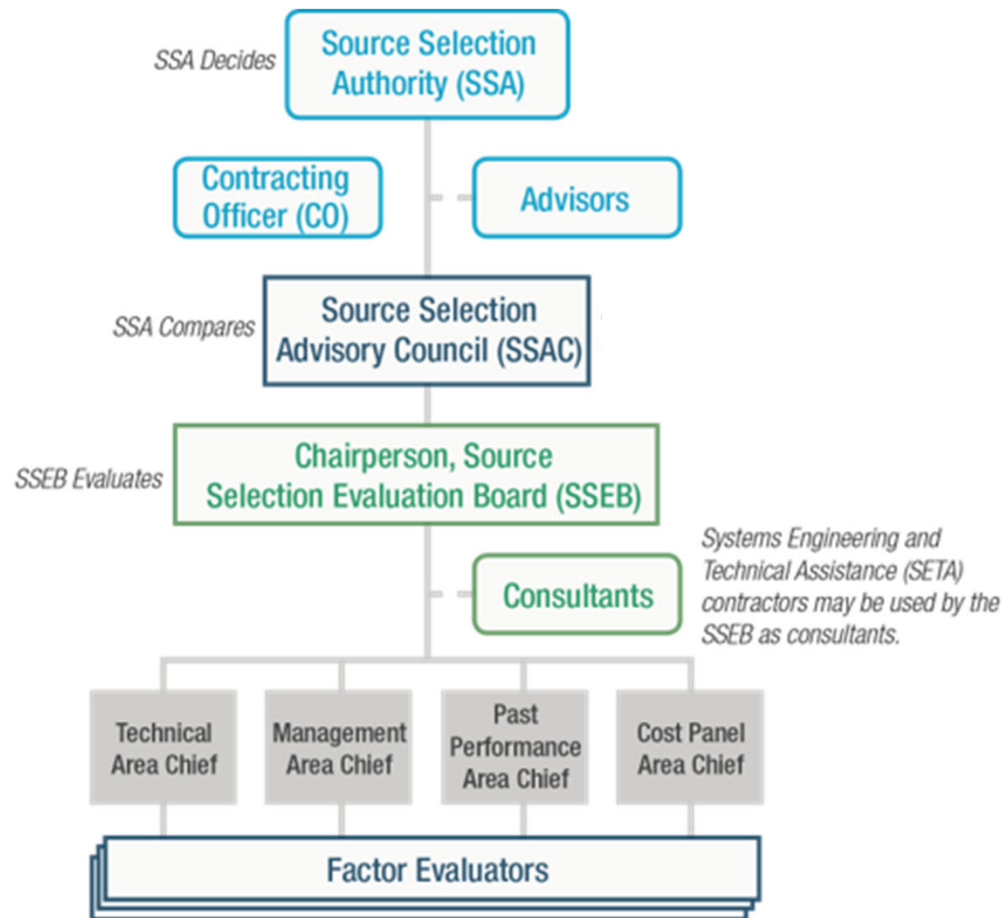
Example: Combined *Technical/Risk* Rating Method

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal indicates an **exceptional approach and understanding** of the requirements and contains **multiple strengths,** and **risk of unsuccessful performance is low.**
Purple	Good	Proposal indicates a **thorough approach** and understanding of the requirements and contains **at least one strength, and risk of unsuccessful performance is low** to moderate.
Green	Acceptable	Proposal **meets requirements** and indicates an **adequate approach and understanding** of the requirements, and **risk of unsuccessful performance is no worse than moderate.**
Yellow	Marginal	Proposal has **not demonstrated an adequate approach and understanding** of the requirements, and/or **risk of unsuccessful performance is high.**
Red	Unacceptable	Proposal does **not meet requirements** of the solicitation, and thus, contains **one or more deficiencies**, and/or **risk of unsuccessful performance is unacceptable**. **Proposal is unawardable.**

Source: Department of Defense Source Selection Procedures

Example: *Technical* Rating Method

Color Rating	Adjectival Rating	Description
Blue	Outstanding	Proposal indicates an exceptional approach and understanding of the requirements and contains multiple strengths.
Purple	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength.
Green	Acceptable	Proposal indicates an adequate approach and understanding of the requirements.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements.
Red	Unacceptable	Proposal does not meet requirements of the solicitation and, thus, contains one or more deficiencies and is unawardable.

Source: Department of Defense Source Selection Procedures

Example: Technical Risk Rating Method

Adjectival Rating	Description
Low	Proposal may contain weakness(es) which have little potential to cause disruption of schedule, increased cost or degradation of performance. Normal contractor effort and normal Government monitoring will likely be able to overcome any difficulties.
Moderate	Proposal contains a significant weakness or combination of weaknesses which may potentially cause disruption of schedule, increased cost or degradation of performance. Special contractor emphasis and close Government monitoring will likely be able to overcome difficulties.
High	Proposal contains a significant weakness or combination of weaknesses which is likely to cause significant disruption of schedule, increased cost or degradation of performance. Is unlikely to overcome any difficulties, even with special contractor emphasis and close Government monitoring.
Unacceptable	Proposal contains a material failure or a combination of significant weaknesses that increases the risk of unsuccessful performance to an unacceptable level.

Department of Defense Source Selection Procedures

Example: *Past Performance Relevancy* Rating Method

Adjectival Rating	Description
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

Source: Department of Defense Source Selection Procedures

Example: *Performance Confidence* Assessments Rating Method

Adjectival Rating	Description
Substantial Confidence	Based on the offeror's recent/relevant performance record, there is a **high expectation** that the offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the offeror's recent/relevant performance record, there is **reasonable expectation** that the offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available or the offeror's performance record is so sparse that **no meaningful confidence assessment rating can be reasonably assigned**. The offeror may not be evaluated favorably or unfavorably on the factor of past performance.
Limited Confidence	Based on the offeror's recent/relevant performance record, the there is **low expectation** that the offeror will successfully perform the required effort.
No Confidence	Based on the offeror's recent/relevant performance record, three is **no expectation** that the offeror will be able to successfully perform the required effort.

Source: Department of Defense Source Selection Procedures
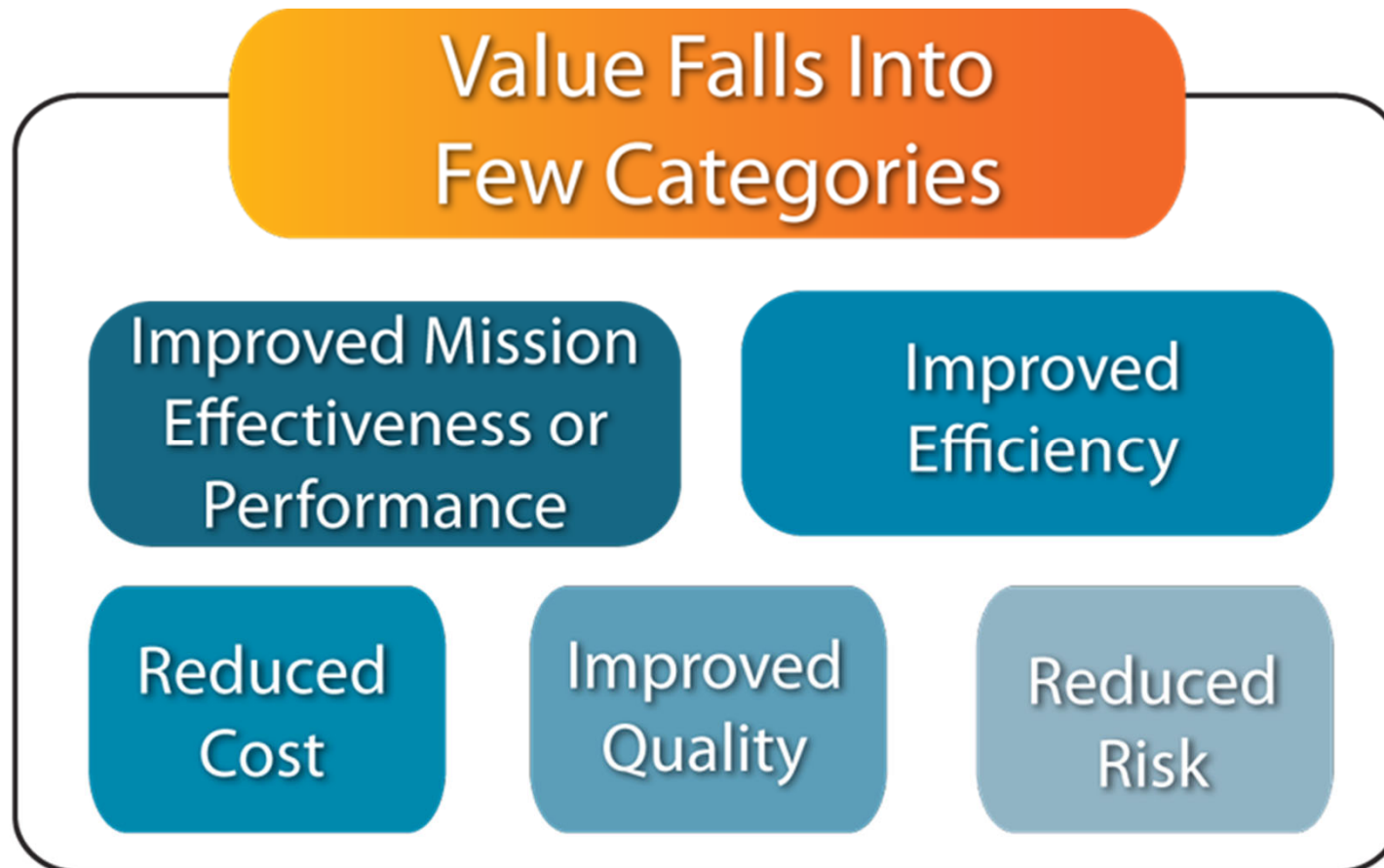
Evaluating Strengths and Weaknesses

- **Strength** is an aspect of a proposal that *has merit or exceeds* specified performance or capability requirements in a way that *will be advantageous* to the Government during contract performance.

- **Weakness** means a flaw in the proposal that *increases the risk* of unsuccessful contract performance.

- **Significant Weakness** in the proposal is a *flaw that appreciably increases the risk* of unsuccessful contract performance.
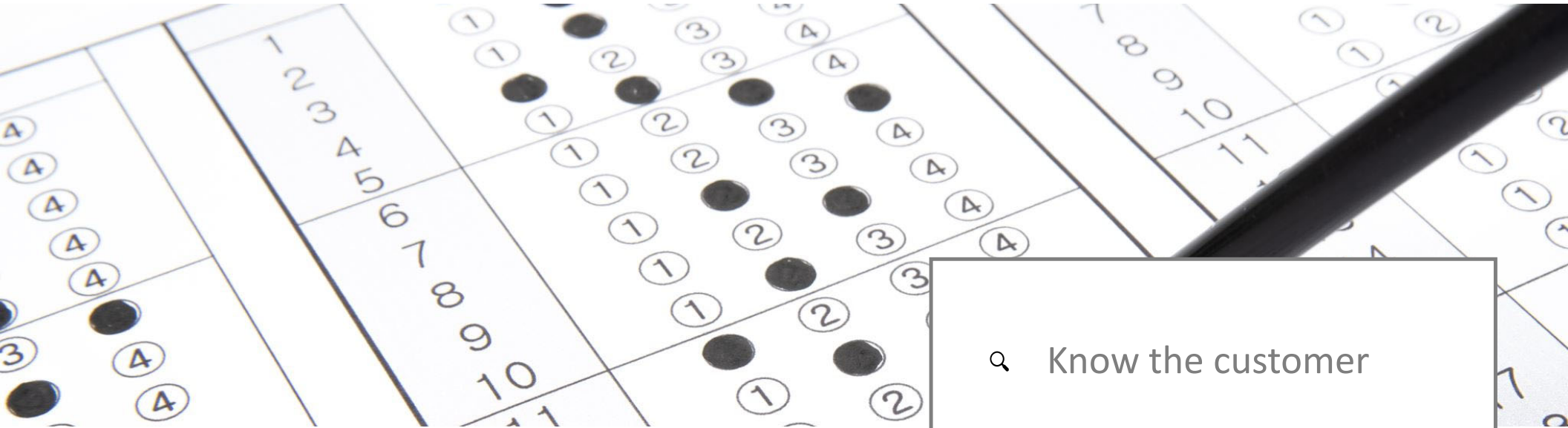
Have you met or exceeded my expectations?

Source: FAR 15.001

The Evaluation Value Box

Value Falls Into Few Categories

- Improved Mission Effectiveness or Performance
- Improved Efficiency
- Reduced Cost
- Improved Quality
- Reduced Risk

Informal, Less Regulated Evaluation Methods

- 🔍 Know the customer
- 🔍 Understand key decision drivers
- 🔍 Relationships matter
- 🔍 Avoid incumbenitis

Informal Evaluation Methods

- Handshake deals
- Back of the proverbial napkin
- Friends and family
- Numeric comparisons
- Ranking
- Single stakeholder decisions
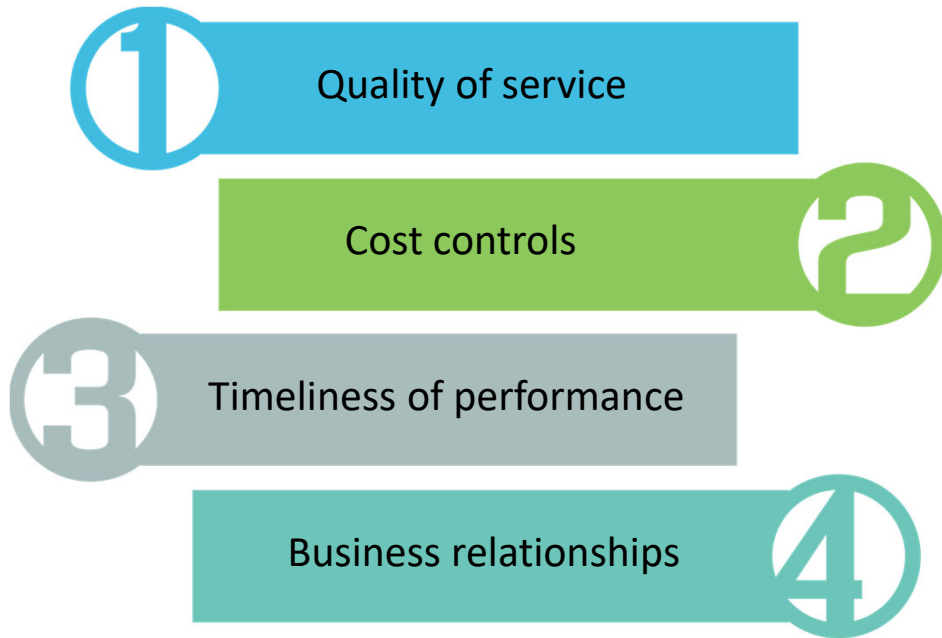- Bidder comparison
- Consultants, committees

Again, Avoid Being Column Fodder

Requirements	A	B	C	D	E
		?	?		Huh?

What Really Influences Evaluation Scores

- 🔍 Proof, proof, proof – Not just "we can"; validate how you'll meet needs.

- 🔍 Relationships matter

- 🔍 Readability: Make it easy
  - ▪ Clear, concise, correct, compelling
  - ▪ Customer focus

Proof of Past Performance

1. Quality of service
2. Cost controls
3. Timeliness of performance
4. Business relationships

*Tell me **HOW** you are going to meet my needs.*

Past performance evaluations assess multiple aspects of performance risk that are considered when making contract awards.

Relationships

An evaluation reality

- Evaluators are human
- Positioning and shaping matter
- Trust is a critical factor
- Asking good questions
- Active listening
- Being present

Customers buy from people they **TRUST**

Employees respond to leaders they **TRUST**

"When the trust account is high, communication is easy, instant, and effective."

— *Stephen R. Covey*

"It takes 20 years to build a reputation and five minutes to ruin it."

— *Warren Buffett*

Readability in Proposals

Improving readability enhances evaluation scores by being clear, concise, correct, and compelling.

From a real customer…

2. OFFEROR RESPONSIBILITY TO SUBMIT AN UNAMBIGUOUS, CONVINCING PROPOSAL

It is the Offeror's responsibility to draft a logical, unambiguous proposal that contains all pertinent information in sufficient detail so that the **evaluators** are able to meaningfully evaluate the Offeror's proposed approach and price.

An Offeror's proposal must clearly and convincingly demonstrate that the Offeror has an accurate understanding of the requirements, the associated risks, and otherwise sufficiently addresses all aspects of the solicitation. An Offeror's proposal must clearly and convincingly demonstrate that the Offeror's proposed approach is viable for the **evaluated** requirements.

Elevating Evaluation Scores with Improved Readability

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
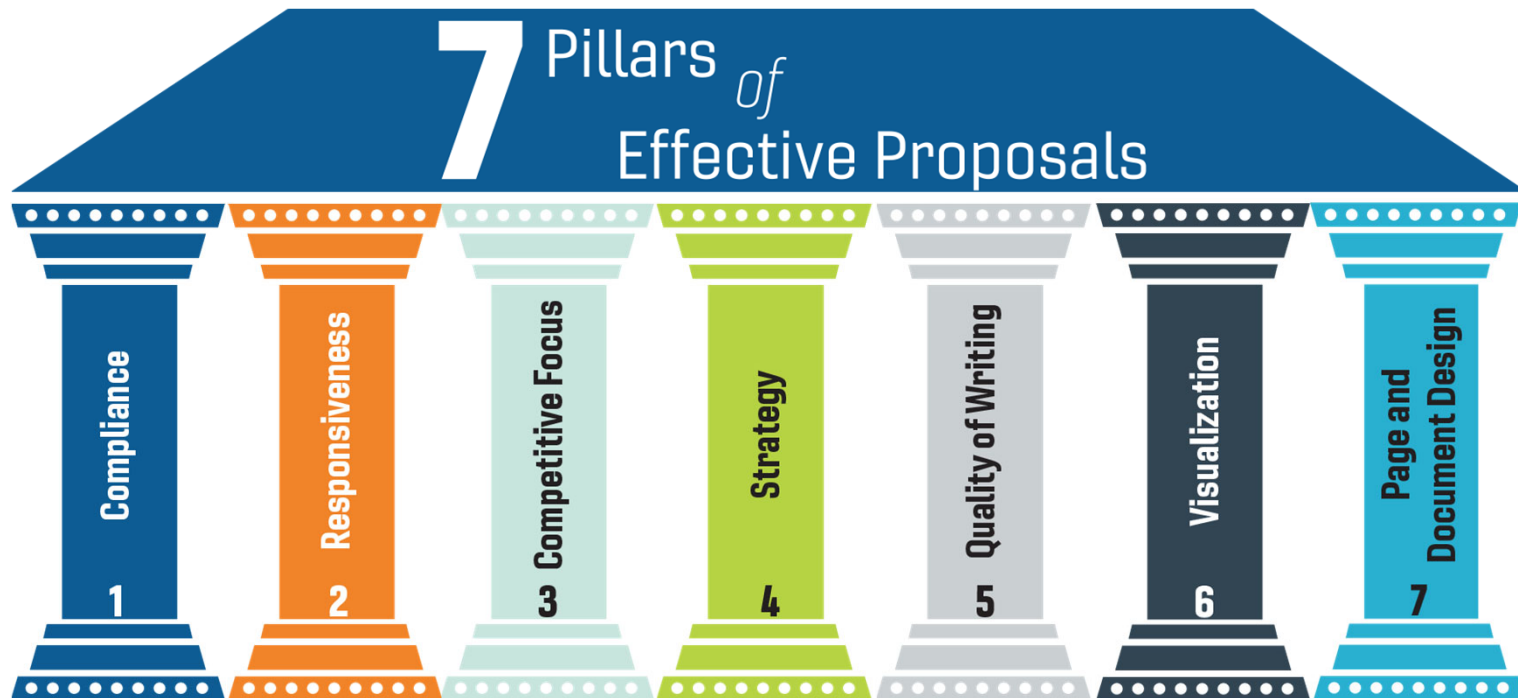
Leverage, with caution, AI and Language Modeling

Pros and benefits

- Quick, easy, and broad access to content
- Source to brainstorm ideas
- Quick first drafts with industry terminology
- Customer and competitor research
- Multi-source data

Cons and cautions

- Avoid adding any confidential information in any tool
- May be dated or wrong – needs verifying
- May contain biased content
- May lack contextual knowledge
- Could shirk responsibility (accountability)
- Could lead to over-zealous, reckless, and inadvertent misuse and mistakes
- Could conflict with reality/truth

Use the Tools You Already Have

Be *Clear*, *Concise*, *Correct*, and *Compelling*

Compelling

Concise

Clear

Correct

Please, please... Make it easy for me.
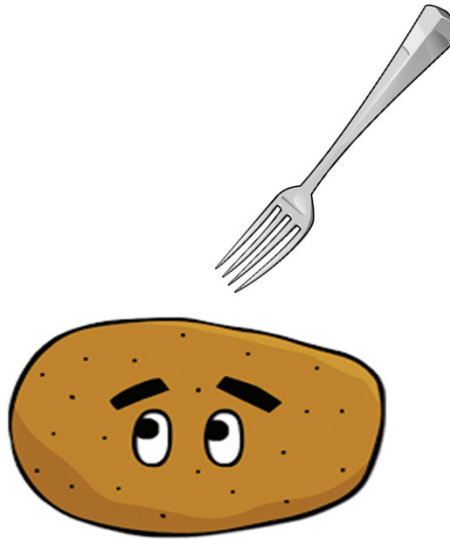
Be Clear

Answer the mail

Before: *"I utilized a multi-tined metal tool to process a starch resource."*

After: *"I used my fork to eat a potato."*

Don't make me guess what you're trying to tell me.

Be Concise

- Watch sentences, paragraphs, and word choice
- Leverage AI for more concise wording

Not		But
enclosed herewith please find		here is
for the purpose of		to
has the ability to		can
in the event that		if
provide a means whereby		enable
take corrective action		correct

I don't need to be overwhelmed by your technical and wordy fluff.

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Be Correct

- Formulas, figures, data, sources
- Word choices:
  - They're – there – their - them
  - Affect – effect
  - Lose – loose
  - That – which
  - Ensure – assure
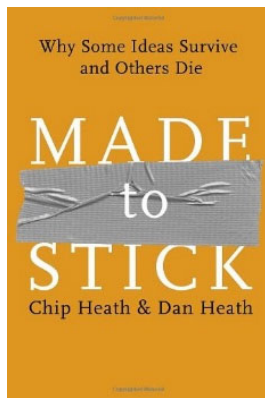 - To – too
  - Lie – lay
  - Anyway – any way

I will verify everything!

Be Compelling

- Persuasive
- Key words are searchable in many evaluations
- "Tell us and show us how"
- Proposal organization matters
  - Follow instructions
  - Bottom line up front (BLUF)
  - Themes and subject lines
  - Use headings to guide evaluator to key responses
  - Group similar ideas

Convince me!

J FKFB INAT OUP SNA SAI RS
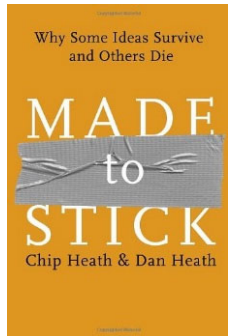

Made to Stick: Why Some Ideas
Survive and Others Die

By: Chip Heath and Dan Heath

JFK FBI   NATO   UPS   NASA   IRS

Made to Stick: Why Some Ideas
Survive and Others Die
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Always Be Evaluator-Focused

How to score higher

01 Name the customer before us.

02 Name the customer more often than us.

03 Mention and address the customer's main buying objective.

04 Link the buying objective to our offer.

05 Address customer "hot button" issues in prioritized order.

06 List **benefits** before features.

07 Validate all claims and **leverage your strengths.**

08 Organize as instructed and for ease of evaluation (group ideas).

09 Make our value proposition apparent to the customer.

10 Be consistent, clear, compelling, and concise.

Webinar Summary

SHIPLEY WEBINAR

NITTY GRITTY PROPOSAL SERIES

SCORE HIGHER
THROUGH READABILITY
AND CUSTOMER FOCUS

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- 🔍 *Understand the evaluation process*
- 🔍 *Know your customer*
- 🔍 *Avoid being column fodder*
- 🔍 *Leverage existing tools and technology*
- 🔍 *Focus on the 7 pillars*
- 🔍 *Stay evaluator-focused*

Questions and Discussion

Our Next Free Webinars

ShipleyAssociates®

NITTY GRITTY PROPOSAL SERIES

mprice@shipleywins.com

pframe@macmul.com

kforsgren@shipleywins.com

bjdouglas@shipleywins.com

THANK YOU

WWW.SHIPLEYWINS.COM

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