

The Exorcist:

*Exorcise Your
Proposal Demons*



by Chuck Keller

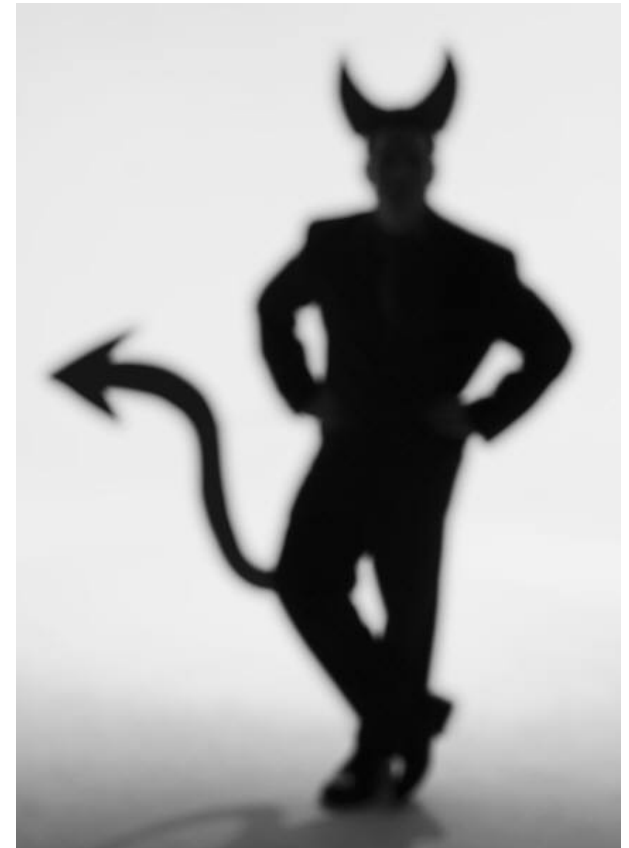
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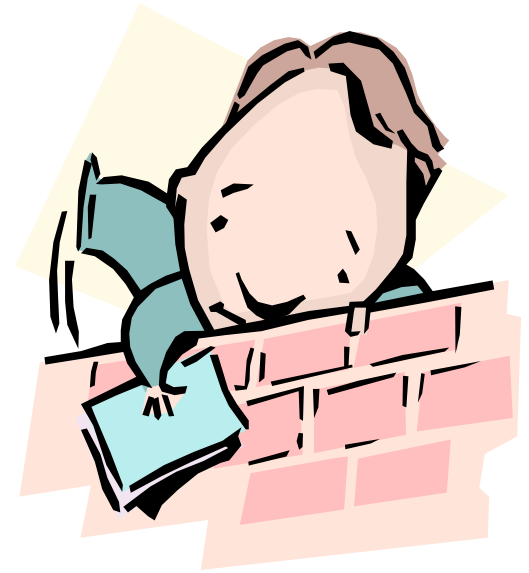
Proposal Demon #1

*The "Writer's Block"
demon.*



Overcoming Writer's Block

- Follow the outline/storyboard.
- Review the strategy plan & proposal themes.
- Answer the 5 W's & 1 H.
- Write quickly & in any order.
- Write about what you know best or have the most interest.
- Note what you intend to write.
- Write overviews & summaries later.



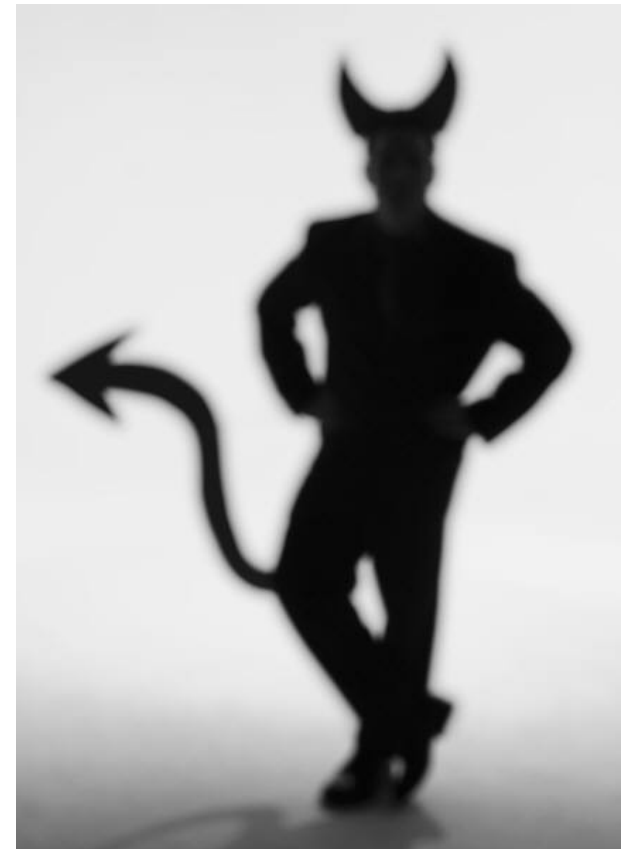
Overcoming Writer's Block (cont.)

- **Develop graphics first.**
- **Just start; when stuck take a break.**
- **Use a thesaurus & dictionary.**
- **Orally explain what you want to write.**
- **Write what you'd like to know if you were the reader.**
- **Start with "boilerplate" & revise.**



Proposal Demon #2

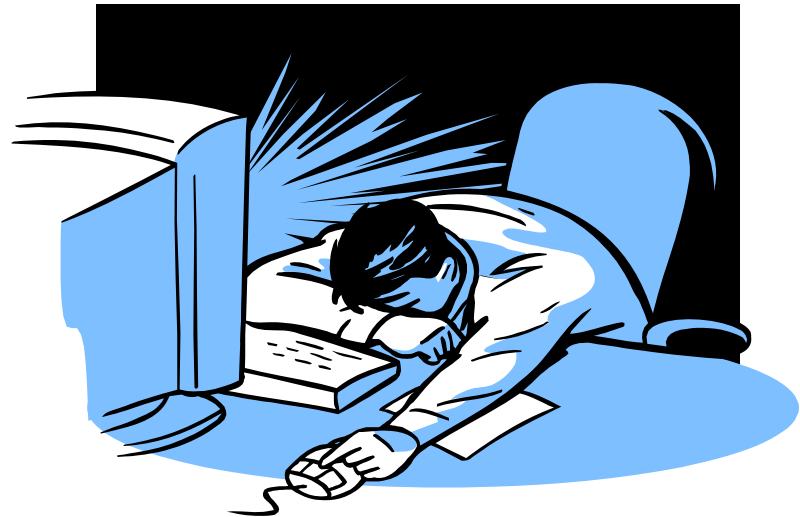
*The "Lazy Man's List"
demon.*



“Lazy” Writing Example

Acme Corporation will provide the following reports:

- **Staffing report**
- **Budget report**
- **Inventory report**
- **Schedule report**
- **Quality report.**

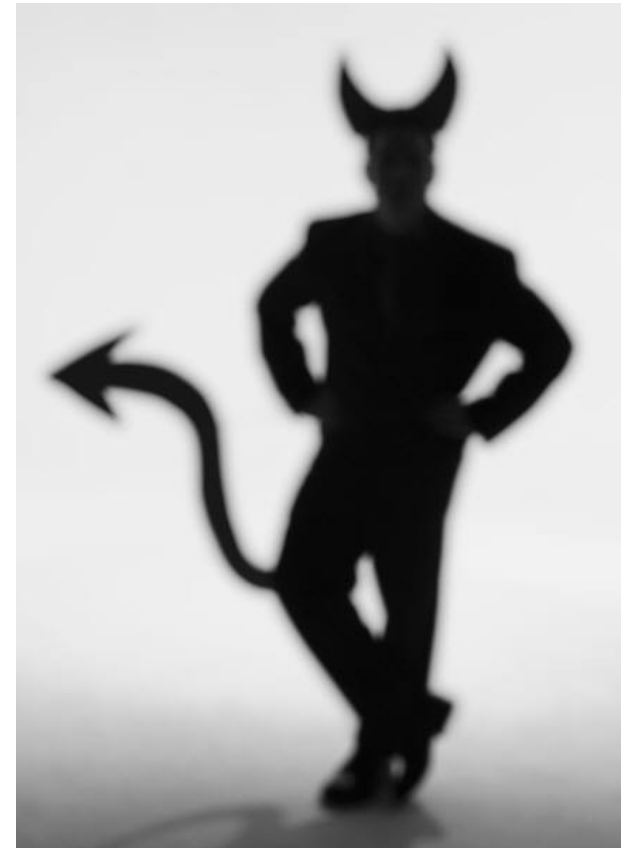


“Lazy Writing” - Corrected

Report	Submittal Date	Originating Dept	Recipient	Purpose
Staffing	Weekly	HR	CO, Project Mgr	Names, positions, weekly labor hours of all assigned contractor personnel
Budget	Monthly	Finance	CO, Project Mgr	Budget expended, budget available, explanation of budget variances
Inventory	Monthly	Material	Project Mgr	Inventory of all vehicles, hardware, tools, test equipment
Schedule	Monthly	Project Management	Project Mgr	Milestone status of completed month; narrative summary of performance
Quality	Quarterly	QA/QC	Project Mgr, Quality Officer	Quality inspection and audit results; minutes of quality improvement meetings

Proposal Demon #3

The "So What?" demon.

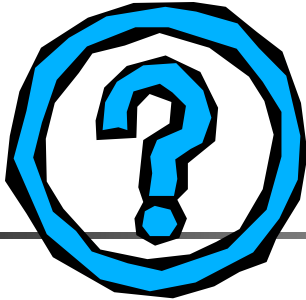


Passing the “So What?” Test



- Stating you're **proud** or **pleased**.
- Claiming you **understand** or are **committed**.
- Citing an **objective**, **philosophy**, or **policy**.
- Stating something is **important** or **crucial** to do.
- Using “**buzz word**” superlatives without proof.

- Listing **features without** benefits.
- Writing w/the “**47 yrs. of experience**” syndrome.
- “**Data dumping**” because you have the boilerplate or want proposal “**filler.**”



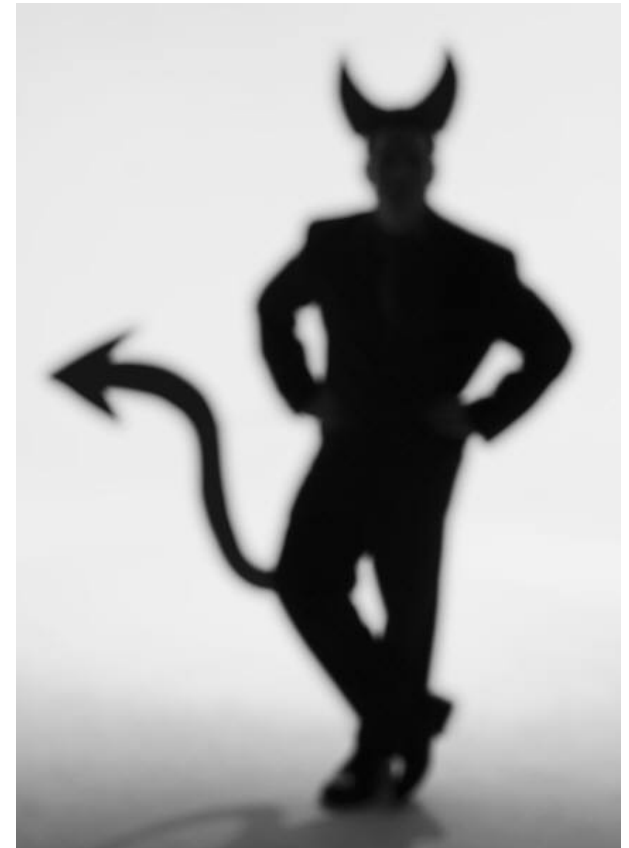
Answering the “So What?”

- *Who* will provide it & *who* will use it?
- *What* does the customer want & *what* work is needed to provide it?
- *When* & *where* will it be produced & delivered?
- *How* will it be produced & delivered, *how* will it benefit the customer, & *how* much will it cost?
- *Why* is it necessary & *why* are you proposing the solution to provide it?

Use a credible detail – between “trust me” promises & over commitment.

Proposal Demon #4

The "Skeletons in the Closet" demon.



Attacking Closet Skeletons Head on

- **Acknowledge.**
- **Resolve or mitigate.**
- **Avoid recurrence.**



Dealing with “Skeletons”



- **Assume that your customer knows your weaknesses:**

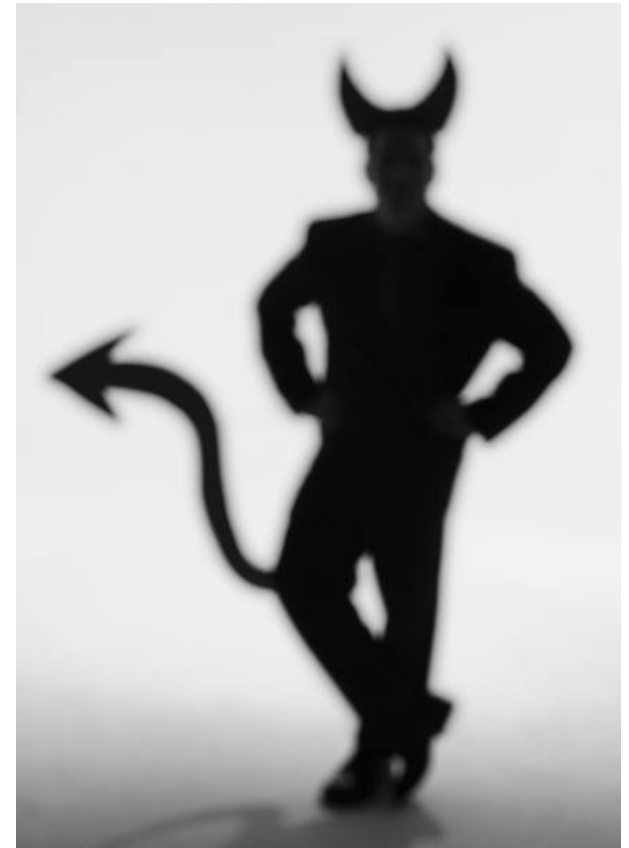
- ✓ Don't ignore them or hope your customer won't know.
- ✓ Overcome or mitigate weaknesses as you prepare proposal.

- **Tell customers your side of the issue:**

- ✓ Acknowledge **real** weakness by explaining what you've done to combat it & to prevent its recurrence.
- ✓ Address **perceived** weakness by explaining why it never existed.

Proposal Demon #5

*The "Busy/Weak Writing
SME" demon.*



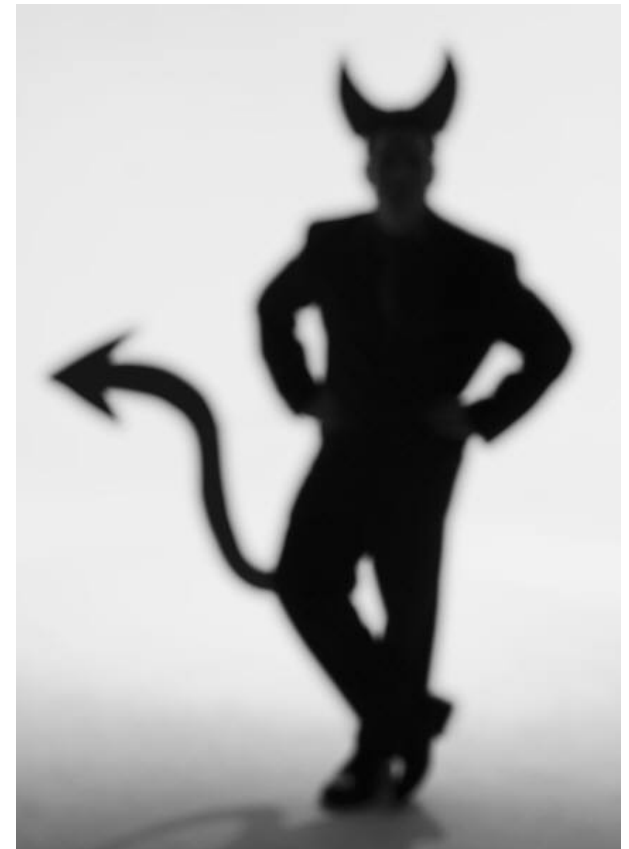
Collecting SME Info



- **Provide training for proposal writing.**
- **Give early notice of need** (content & schedule).
- **Provide RFP, detailed outline with RFP x-reference; discuss required info.**
- **Collect:**
 - ✓ Interview; write & provide draft for SME review/revision.
 - ✓ Provide written questions for answers.
 - ✓ Provide boilerplate or other reference info for revision.
 - ✓ Write initial draft & provide for review/revision.
 - ✓ Allow time for getting clarification & more info.

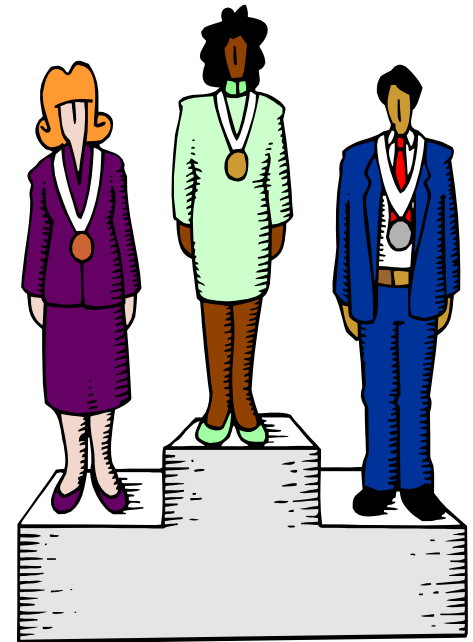
Proposal Demon #6

The "Incumbent-itis" demon.



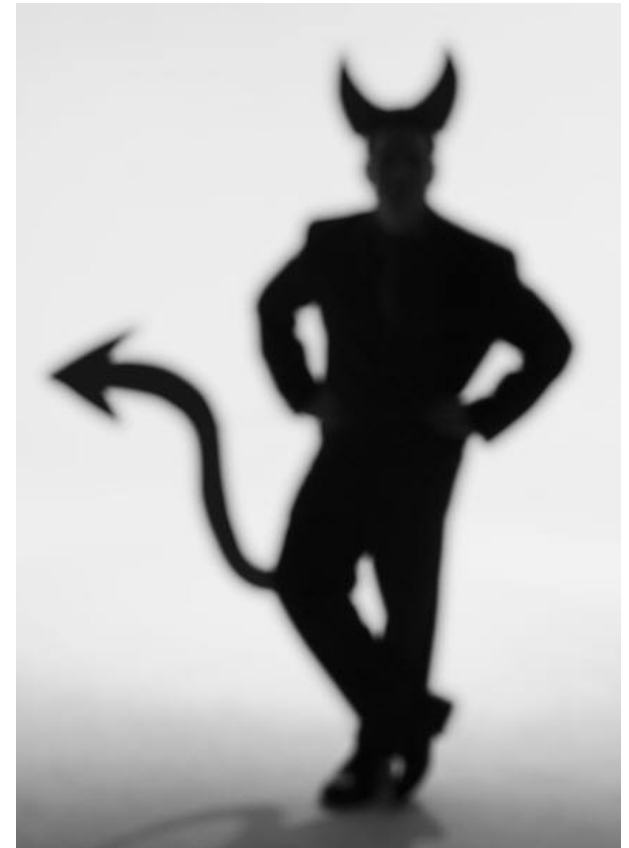
Winning as the Incumbent

- Perform well on the current job.
- Remember “lessons learned” from last proposal.
- Assist client with RFP development.
- Evaluate why there’s a re-compete.
- Take your competition seriously.
- Be wary of knowing too much.
- Write to your “audience.”
- Emphasize legacy knowledge & staff/service continuity, but consider proposing change.
- Use proposal SME’s familiar with current job.



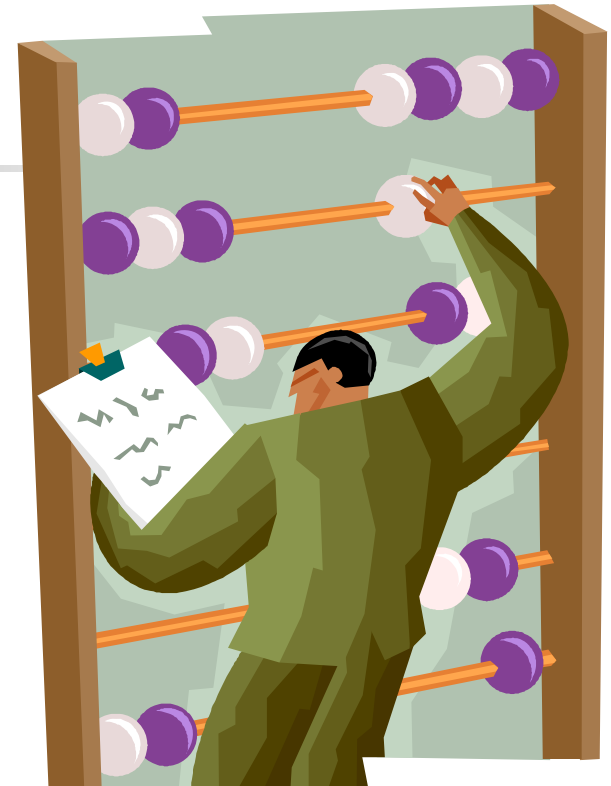
Proposal Demon #7

*The "L and M
Disconnect" demon.*



Easy as 1, 2, 3.

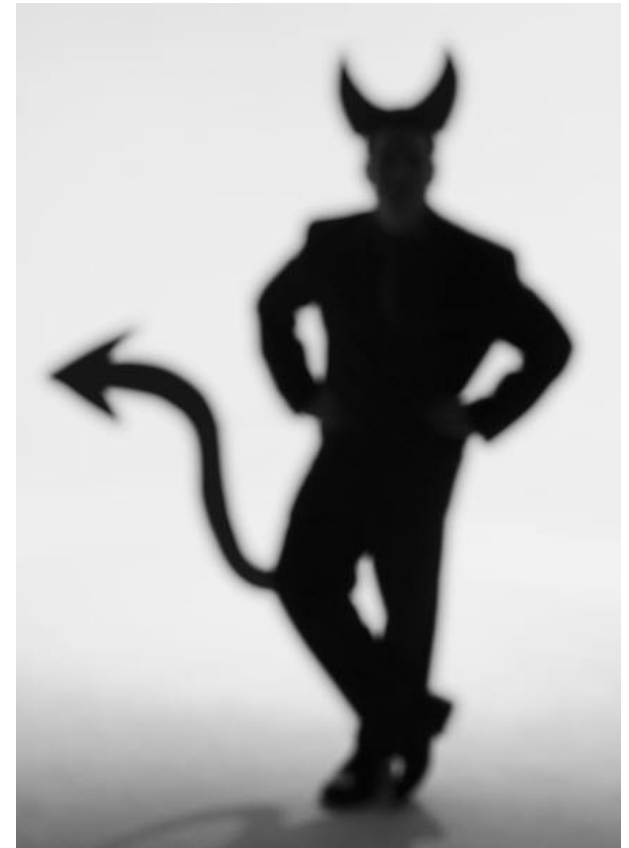
1. L – proposal instructions
2. M – evaluation criteria
3. C – statement of work



Consider submitting question for customer clarification.

Proposal Demon #8

*The "So Much to Write,
So Little Space" demon.*



“Fitting” within Page Limits



- Set page targets in the outline.
- Allocate enough pages for key/complex proposal sections.
- Use graphics (especially tables).
- Use layout & typographical options for max page content.
- Refer to other sections to avoid repeating.
- Put info in sections that aren't page limited.
- Indicate details are available if desired.

Consider “Flavors” & “Hand Grenade” responsiveness.

"Flavors" of Responsiveness



RFP responsiveness:

- 1. Explain approach/provide requested info to meet specific reqts.**
- 2. Commit to comply with specific reqts. w/o amplification (reqts. by ID or RFP reference).**
- 3. Take no exceptions or deviations w/o stating specific reqts. or providing amplification.**

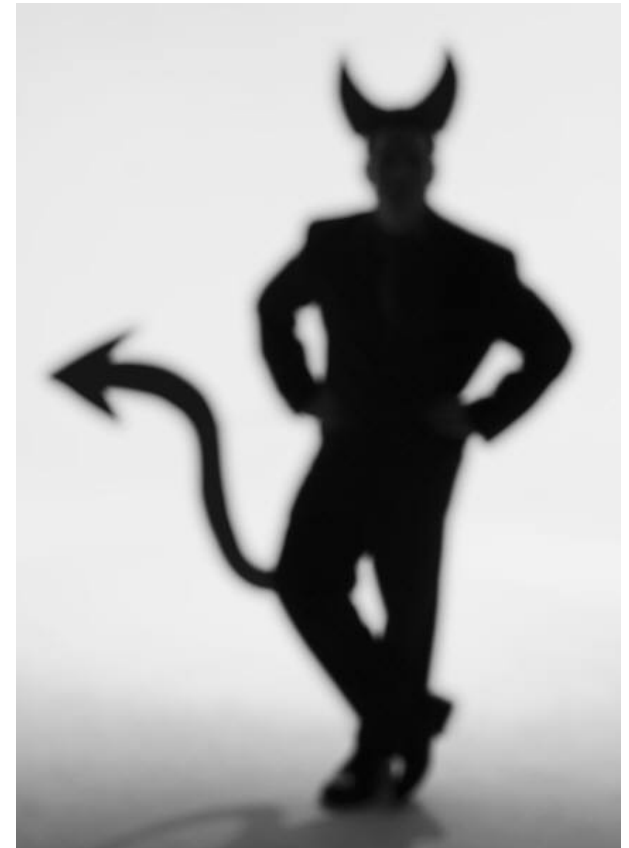
“Hand Grenade” Responsiveness



- **Consolidate & group similar/related tasks.**
- **Summarize workflow in diagrams/step tables with amplifying info.**
- **Use compliance matrices with amplifying info.**
- **Show risk assessment & management for typical/expected issues.**
- **Use scenarios to explain your approach.**
- **Provide case studies with similar requirements.**

Proposal Demon #9

*The "Every Picture
Doesn't Tell a Story"
demon.*



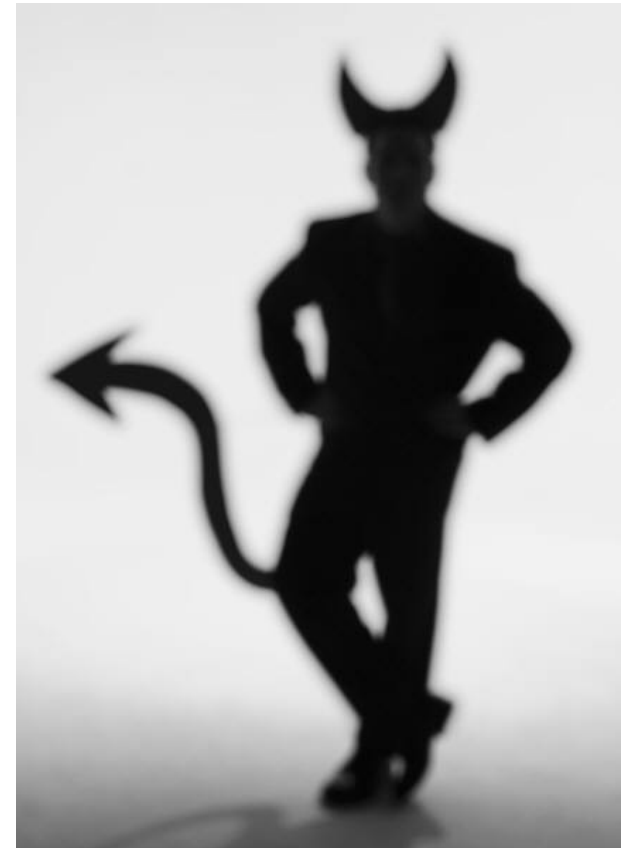
Supporting Graphics



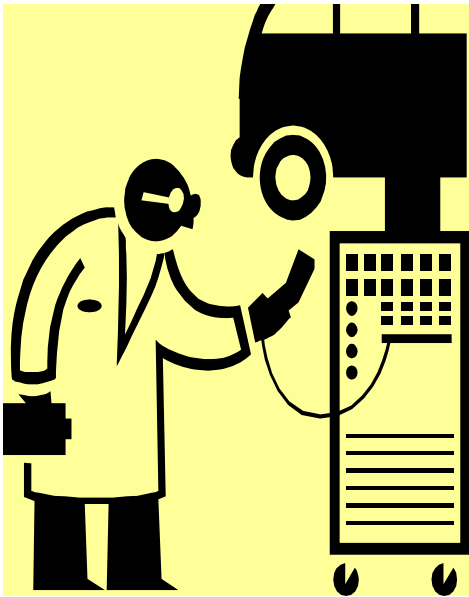
- Always have a graphic referral & caption.
- Summarize key point(s) in the text & an action caption.
- Refer to graphic early in process or organization descriptions.
- Use a consistent style.
- Minimize “eye candy.”

Proposal Demon #10

*The “Red Team
Accountability Blues”
demon.*



Analyzing & Fixing the Proposal



- **Use a review form.**
- **Clearly identify the problem & recommend a solution:** it's not enough to state something is wrong; recommend a remedy.
- **Track recommendations to some form of resolution:** remember that recommendations can be good & bad.



Review Form

Disposition	Accept:	Reject:	Optional:	Research:
Proposal Section & Topic:				
Applicable RFP Section:				
Comment/Question:				
Recommendation:				
Reviewer:	Reviewer Phone/E-mail:		Reviewer Log #:	

Review Resolution Categories



- **Review recommendations & ensure resolution:**
 - ✓ **Accept** – valid recommendation & mandatory change
 - ✓ **Reject** – rejected recommendation because it's wrong, inappropriate, or unfeasible
 - ✓ **Optional** – valid recommendation, but not critical (Change decision is up to the applicable writer.)
 - ✓ **Research** – recommendation that could be valid based on more analysis (If valid, process as an accept or optional change.)

Log & track all review recommendations to resolution.

Avoid these 10 Proposal Demons!!!



1. "Writer's Block"
2. "Lazy Man's List"
3. "So What?"
4. "Skeletons in the Closet"
5. "Busy/Weak Writing SME"
6. "Incumbent-itis"
7. "L & M Disconnect"
8. "So Much to Write, so Little Space"
9. "Every Picture Doesn't Tell a Story"
10. "Red Team Accountability Blues"

Presentation Reference - Proposal Writing: The Art of Friendly and Winning Persuasion by Pfeiffer and Keller, <http://vig.pearsoned.com/store/home?url=/proposalcafe>