

# Making Time Your Best Friend, Not Your Worst Enemy

---

John Lauderdale

Proposal Leadership, Inc

---

[jclauderdale@hotmail.com](mailto:jclauderdale@hotmail.com)

703-629-1166

May, 2006

---

# Principles

1. Proposal Management is a sub-set of Program / Project Management
  2. Therefore, these processes, tools and principles have more general application
  3. Leadership is more important than management
  4. “Follow me” is more effective than, “Do it this way”
-

---

## Instructional Objective

- Provide specific principles, tools, and processes that assist in managing time in proposal creation.
-

---

## “Making Time ....

- Introductions
  - Ground Rules
  - The Importance of Time
  - Allocation of Activities by Time Period
  - Specific Guideposts and Measures
  - Conducting Effective Meetings
  - Wrap-up and Questions
-

---

# Introductions

- **Speaker**
  - **Participants**
-

---

# Ground Rules

- Only one conversation at a time
  - Turn off cell phones, pagers
  - Everyone is a participant; no attendees
  - My worst nightmare – no participation
  - If you have a better idea, let it out
  - Please have fun
-

---

# The Importance of Time

- Time pressure is universal in proposals
  - Time is Money (\$\$\$)
  - Being late to intermediate deadlines is a precursor to being late for other deadlines, including being late in delivery, OR suffering that last-minute panic that can be a part of our business
-

---

## *Important Notes:*

1. Most Important Control Mechanism is the Proposal Development Schedule, a critical part of the Proposal Plan
  2. Use both right-to-left scheduling, and left-to-right scheduling, to use time wisely
-

---

# Allocation of Activities by Time Period

- 1. Pre-Solicitation
  - 2. Solicitation Release + 5 Days
  - 3. Proposal Creation and Delivery
  - 4. Post-Submission
-

---

# 1. Pre-Solicitation

- Use the Capture Plan to obtain permission, buy-in, and budget
  - Start the Executive Summary, to ensure top-down creation, and executive involvement
  - Start the Compliance Matrix (or the Responsibility Assignment Matrix -- RAM) to scope the task and start work on the Long Lead Items
  - Create a Proposal Plan, with about 20 attachments
-

---

## 2. Solicitation Release + 5 Days

- Read the solicitation. EVERY WORD. No exceptions
  - Punch, bind, and tab the solicitation for easy reference
  - Compare the “final” with the draft solicitation, to find out who has won, and who has lost, in within the customer’s own organization
  - Start a list of questions to ask the customer
  - Later: Maintain an electronic copy of the LATEST version of each RFP section.
-

---

## 3. Proposal Creation and Delivery

- Maintain your Proposal Plan -- it's a living document
  - “Publish” everything on the company's Intranet -- and organize the materials in folders that are clear, easy to use
-

---

## 4. Post-Submission

- Plan for the orals, site visit, any other scheduled requirements
  - Continue to market through (legal) back-channels such as industry gatherings
  - Conduct “lessons-learned” evaluation of the process and the results
  - Enhance and expand any plans included in the submission
-

---

# Specific Guideposts and Measures

## (1/4)

At the Beginning of a Proposal Effort,  
The Three Questions to Ask:

1. Where's the Capture Plan?
  2. Where's the Compliance Matrix (or the Responsibility Assignment Matrix <RAM>)?
  3. Where's the Executive Summary?
-

---

# Specific Guideposts and Measures

## (2/4)

- Do I have the right team members, and the right support from within the company and the team?
  - Should we REALLY be bidding this job?
  - What are the long-lead items we may have forgotten, but are now required?
-

---

# Specific Guideposts and Measures

## (3/4)

Use index numbers for all list that appear more than once in the proposal, such as ..

1. Team members
2. Important experience / past performance citations
3. Key Personnel

“Retire” sections of the response that CAN be retired, to make way for the remaining work

---

---

# Specific Guideposts and Measures

(4/4)

- Prepare modifications you know must be done to your submission, irrespective of any customer requests (changes in team members; improvements in plans; corrections of identified errors; revised data on experience or past performance)
  - Maintain at least contact information for, and access to, that small number of individuals you will probably need for changes
-

---

# Conducting Effective Meetings

1.0 ~7:30 am Stand-Up Proposal Team Meeting

2.0 ~5:30 pm Circle-the-Wagons Meeting

---

---

# Absolute RULES for Meetings

Begin on Time

Establish firm meeting times

Facilitate attendance through toll-free call-in number OR Net-Meeting or similar service

Choose at least ONE back-up meeting leader, to assure no single point of failure

---

---

# Absolute RULES for Meetings

## (cont)

Begin each meeting with brief re-statement  
of the format and purpose of the meeting

Move with dispatch through the format

Time box discussions by moving some  
items off-line, to a smaller group

Close on a positive note

---

---

## 1.0 ~7:30 Stand-Up Meeting

- 1.1 Set the real start time to accommodate the participants
  - 1.2 Conduct the meeting in three parts:
    - 1.2.1 Broadcast -- what has happened since last team meeting that's of universal interest
    - 1.2.2 Action Item List (see next slide)*
    - 1.2.3 Around-the-Table (Is EVERYONE on board??)
-

---

## 1.2.2 Action Item List

In Two Parts: Open Items and Closed Items

*Column headings:*

**Index Number**

**Issue (as a question - not a label!!)**

**Raised By**

**Assigned To**

**Date Initiated**

**Date Due**

**Status / Results**

*(Upon your request via e-mail, available as a Word template)*

---

---

## 2.0 ~5:30 “Circle the Wagons” Meeting

- 2.1 Purpose is Load Leveling
  - 2.2 NO published agenda or documentation
  - 2.3 This is probably the most important meeting for team-building
  - 2.4 Purpose is Load Leveling
-

---

# Wrap-Up and Questions

- Upon your request, I'll send you a template of the Action Items List AND the Abstract of Key Materials
  - Questions (and Comments)
-