



TRICK OR TREAT



**Secrets of
The Proposal Whisperer**
Terry Clayton, AM APMP



Overview

Keeping your proposals out of the graveyard of undistinguishable proposals

- **Demons lurking in services proposals**
- **Proposal “tricks” for getting shortlist “treats”**



Demonstrating inservices proposals!

- **What makes proposals for services so scary?**
 - Well defined requirements in RFPs allow very little room for innovations or efficiencies
 - Incumbents have the advantage and win the majority of the time
 - RFPs often are “cut and paste” from a 5-year old RFP used on the previous procurement, further stifling innovations or efficiencies
- **What makes differentiation across services bidders so tricky?**
 - All bidders promise to hire qualified incumbent personnel
 - All bidders propose to advertise open positions in regional media
 - All bidders propose to hold a job fair in a local venue
 - All bidders have the same pool of personnel available to them
 - All bidders’ staff for the project must meet the same minimum requirements defined in the RFP
 - 90% of costs are in wages prescribed by the DOL WD or CBA allowing limited variance in price proposals
 - Best Value Awards allow



Proposaltricks forgetting shortlisttreats

- **Proposal tricks for getting “shortlist” treats**
 - **Strategy**
 - **How**
 - **Approach**
 - **Plan**
 - **Capability**
 - **Understanding**
 - **Knowledge**
- **Make your proposals rise from the graveyard of forgettable proposals**



Describe your STRATEGY

Strategy: Plan of action designed to achieve a particular goal

- Strategy does not include implementation or execution.
- Higher level than Approach or Plan
- Harder to define – evaluator recognizes an effective strategy
- **DESCRIBE:**
 - **GOAL/OBJECTIVE** to be achieved
 - **ELEMENTS** required to achieve the goal/objective
 - Can include people, processes, procedures, facilities, materials, equipment, corporate commitments, etc.



DescribeHOW

How: *Way or manner of doing something*

- **Answers in what way, manner, or means client's requirements will be provided or performed**
- **See "APPROACH"**



Describe your **APPROACH...**

Approach: Method used, steps taken, to perform a task

- **DESCRIBE HOW:**
 - Identify the required steps, phases or elements
 - May be accomplished in series or parallel
 - Describe the procedures, methods, techniques used
 - Identify P&Ps, SOPs, etc.
 - Identify recognized industry, national or government standards
 - Describe documentation (logs, reports, etc.) and records maintenance
- **TELL WHO:**
 - The position or organization that executes each step, phase or element
 - The position or organization that manages, supervises, or oversees execution
 - The position or organization that provides quality control
- **PROVIDE PROOF:**
 - Previous experience in similar or relevant conditions or with same personnel where approach successfully was used
 - Quantitative results achieved – eg, budget, schedule, performance objectives



Describe your PLAN

Plan: Method of performing, doing, proceeding, making, etc.

- **DESCRIBE:**
 - **OBJECTIVES** to be achieved and why
 - **WHAT** are the steps, elements or phases of the plan?
 - **HOW** is each step, element, phase executed?
 - Procedures, methods, techniques used
 - P&Ps, SOPs, etc., and recognized standards used (e.g., ISO)
 - Required documentation (logs, reports, etc.) & records maintenance
 - **WHO** executes, manages or verifies each step, element, phase?
 - Position or organization that executes each step, phase or element
 - Position or organization that manages, supervises, or oversees execution
 - Position or organization that provides quality control
 - **WHEN** is each step element, phase performed?
 - Schedule for accomplishing tasks / events; frequency; etc.
- **PROVIDE PROOF:**
 - Previous experience under similar or relevant conditions or with the same personnel, demonstrating that the proposed approach works
 - Quantitative results achieved – e.g., budget, schedule, performance



Describe your COMPANY'S CAPABILITIES

Capabilities: qualities, abilities, features, and such, that can be tapped, used or developed for a specific purpose

- **Applies to companies**
- **Corporate qualities, abilities and features include its:**
 - **People:** Personnel with skills and successful performance
 - **Processes:** P&Ps, SOPs, Orders, Methodologies
 - **Systems:** Management and administrative policies, procedures, practices
 - **Software:** COTS or proprietary computer programs
 - **Hardware:** Company owned and provided equipment, materials and supplies
 - **Facilities:** Physical facilities, offices, laboratories, etc.
 - **Experience:** Successful performance in relevant work similar in size, scope and complexity and/or for same client



Describe your ABILITIES

Abilities: competence in an activity because of skill, training, or other qualification

- **Generally applies to individuals** - if applied to a Company, see “capability”
- **An individual’s skills, training, and qualifications:**
 - Education
 - Training
 - Professional Certifications
 - Expertise
 - Experience
 - Awards, performance metrics, commendations
 - Accomplishments with quantitative results



Describe your **UNDERSTANDING** or **KNOWLEDGE** of...

Understanding: Knowledge of, or familiarity with, a particular requirement

Knowledge: Familiarity gained through education, training, observation, or experience

- **May be applied to a company or an individual**
- **Present persuasive discussion of subject area**
 1. Identify requirements relevant to the project and cite source documents
 2. Identify personnel qualifications for performing work on the project
 3. Cite techniques, methods, and tactics for performing/achieving requirements
 4. Provide anecdotal evidence of recognized expertise in subject
 5. Provide evidence of proficiency in subject areas
- **Describe how knowledge / understanding was attained**
- **Hierarchy of experience**
 1. Providing same services at same location for same client (i.e., incumbent)
 2. Providing same services at another location for same client
 3. Providing same services at another location for a different federal client
 4. Providing same services for a contractor working for the same client
 5. Providing same services at another location for a commercial client



Examples

- **Strategy**
- **How**
- **Approach**
- **Plan**
- **Capabilities/Abilities**
- **Understanding/Knowledge**



Keeping your proposals out of the graveyard of forgettable proposals

- **Assess and define task performance**
 - Define steps, phases, elements, methods
 - Identify staffing levels and mix
 - Determine materials, equipment & supplies
 - Develop schedule of activities and tasks
- **Provide convincing details**
 - Tap your SMEs
 - Mine your P&Ps, SOPs, etc.
 - Research recognized standards
 - Google
 - Use your intuition
- **Provide proof of performance**