

Take “your little shops of horrors” and
transform them into integrated smooth
running proposal shops

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Proposal Management

- Mission Statement: A Proposal Management team enables sales to drive revenue by producing timely, comprehensive, innovative and persuasive customer quotes and proposals.

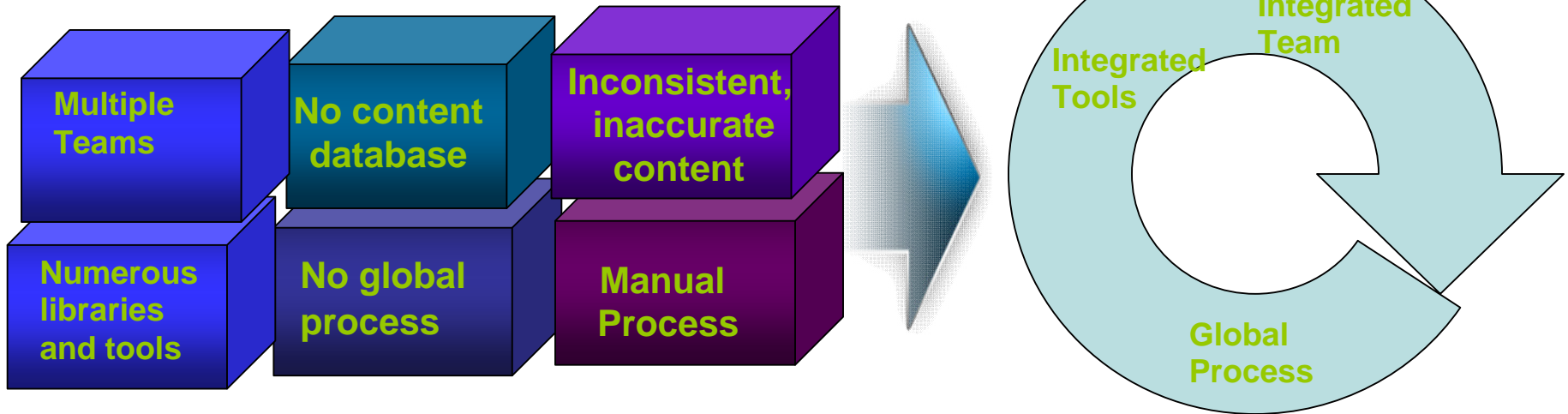


Typical problem

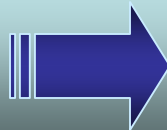
Common Goal...

Typical Problem

The Solution



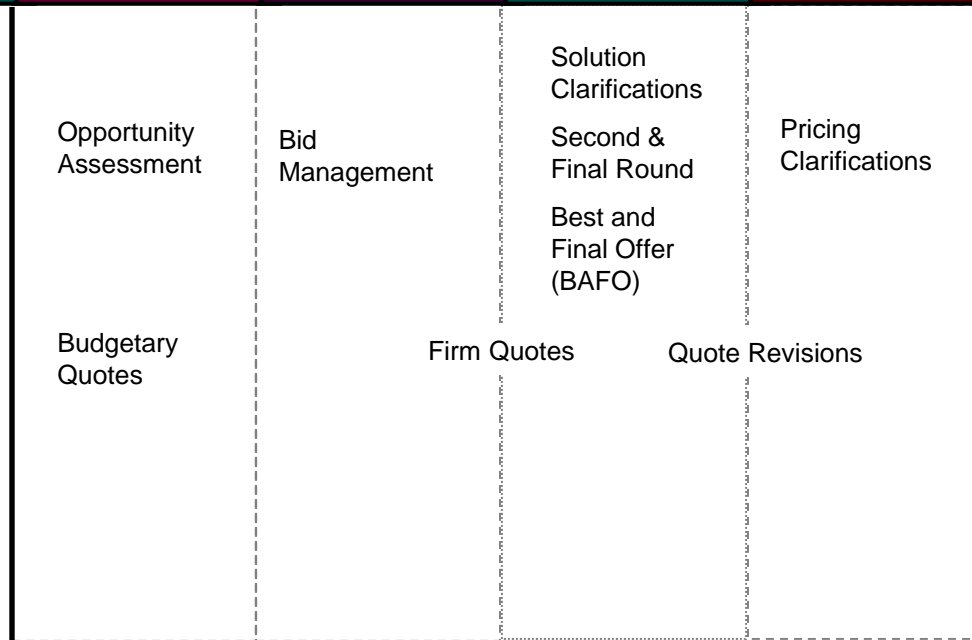
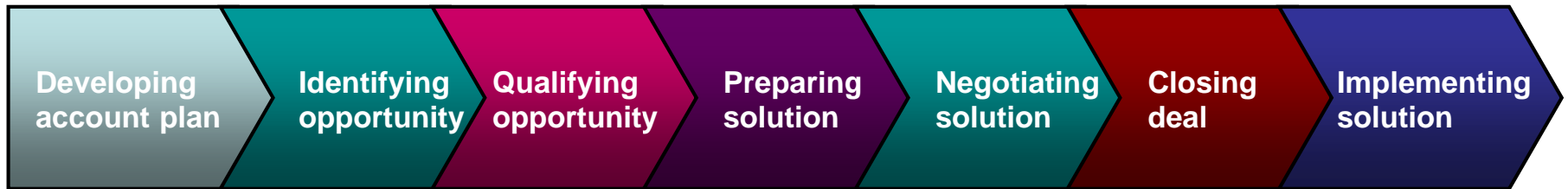
**Integration
Solution**



***Drive Efficiencies
Increase Sales Productivity***

Understand the Sales Process and align the proposal process

Sales Process



Proposal Management

What is Proposals Management?

- **One-stop-shop** for the sales force that includes: bid analysis, team coordination, quality assurance, and content development.
- **Development of quotations**
- **RFX and unsolicited proposal content that is 100% accurate**

Proposals Management Core Competency Model

BID MANAGEMENT

Purpose

- > Complex RFPs and proposals

Responsibilities

- > Analysis of Project
- > Resource Discovery
- > Team leadership
- > Project Management
- > Quality Assurance of Project
- > Custom Content Coordination
- > Financial Approval Coordination
- > Production Management

CONTENT MANAGEMENT

Purpose

- > Content, Tools, Process, Metrics

Responsibilities

- > Content Management
- > Tools, Procedures, Templates
- > Metrics
- > Business owners of SANT
- > Interface to I.S. et al

QUOTE MANAGEMENT

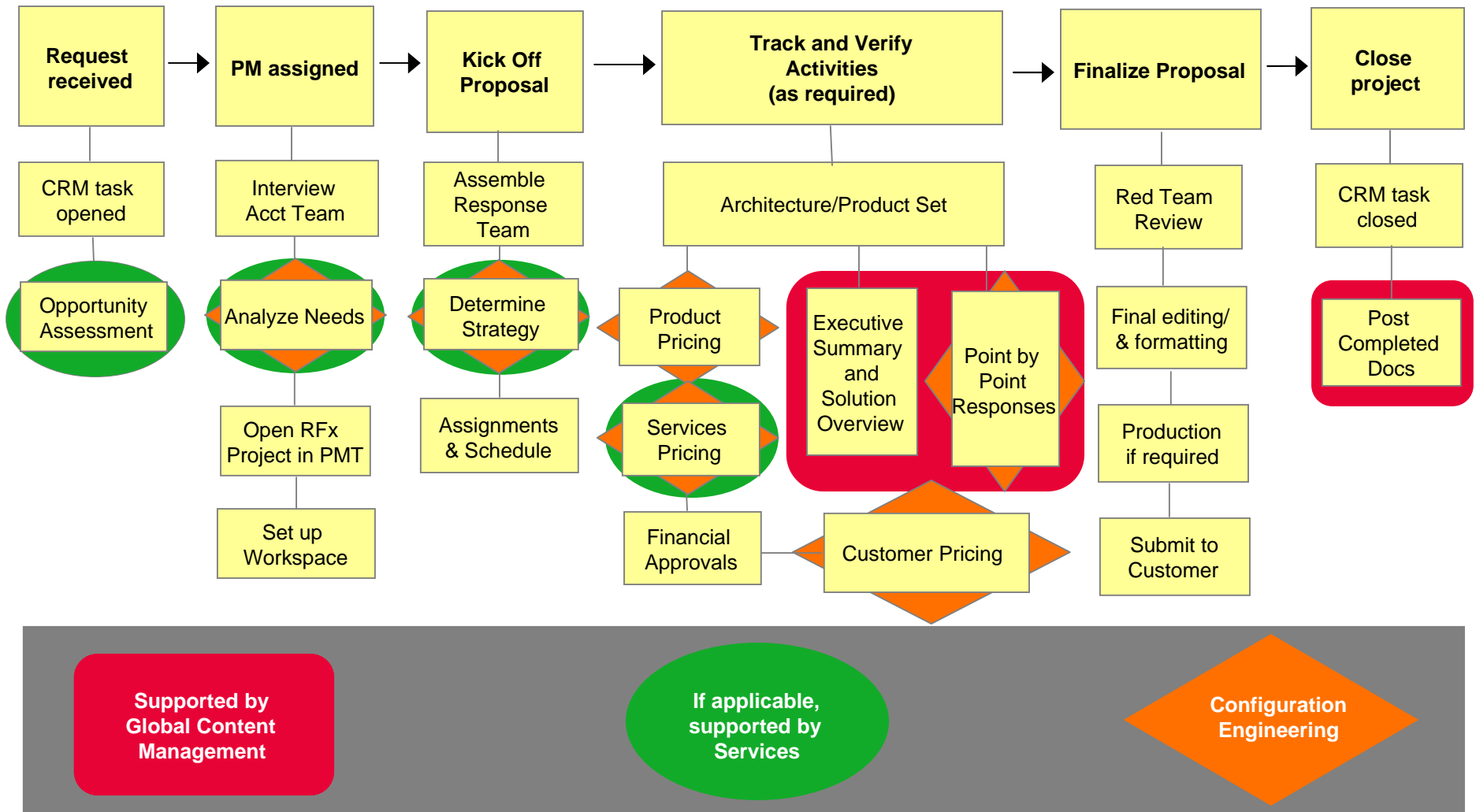
Purpose

- > Routine Quotes and Proposals

Responsibilities

- > Quotation Proposals
- > Analysis of Quote
- > Team Leadership of small team
- > Pricing
- > Financial Approval Preparation
- > Financial Approval Coordination

Proposal Management Workflow – highlevel



GlobalContent Management

- Work with Product and Marketing teams to obtain product and service content
- Maintain product, service and corporate content
- Work with Proposal Managers to retrieve new content
- Coordinate globally content updates and templates

Definition of Bid Management and Bid Manager Role

Bid Management - Definition

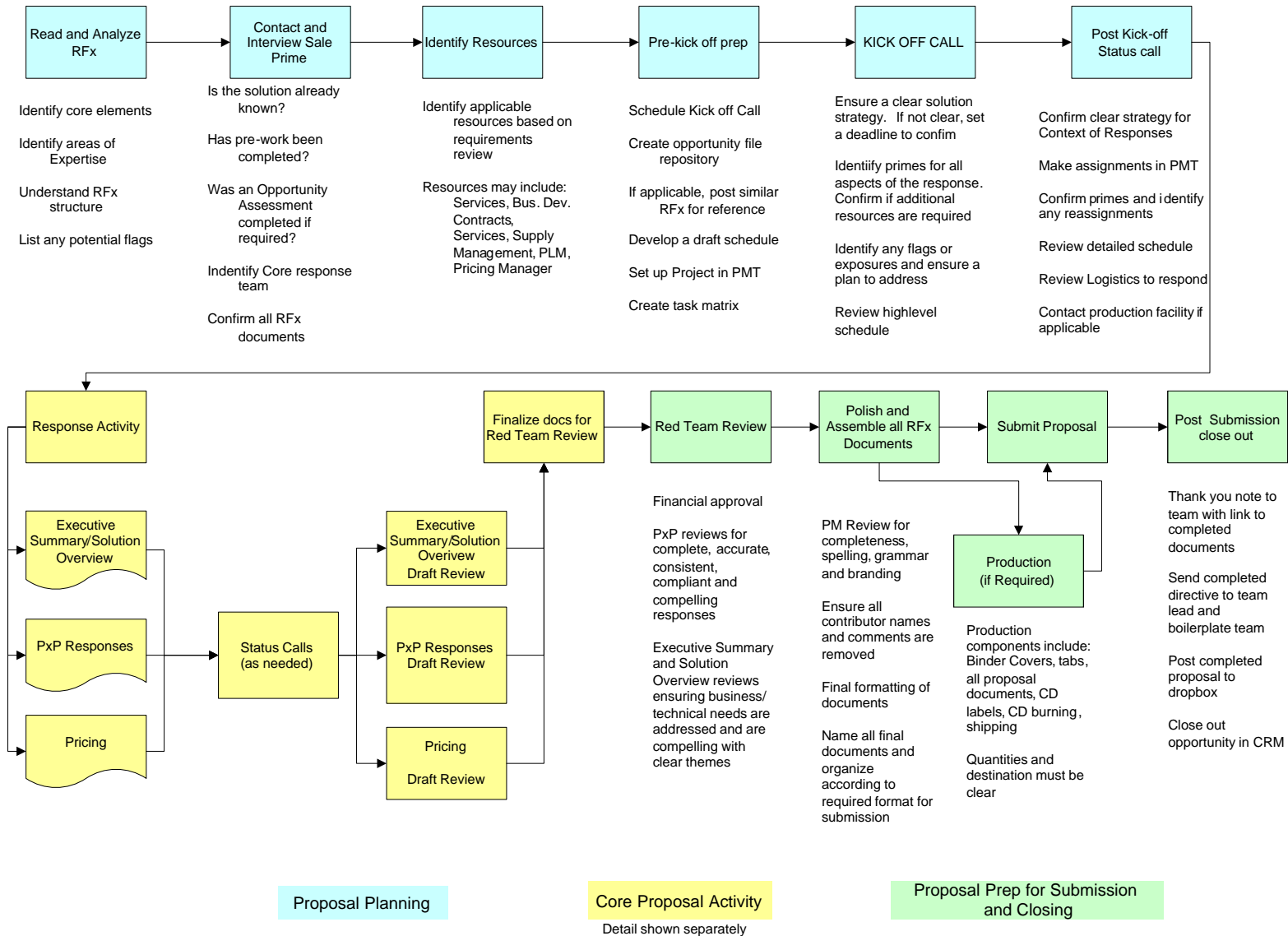
► Management and Coordination of a Timely, multi-organizational, commercially approved response to a Customer Request for Proposal (including unsolicited proposals) or Information that is comprehensive, coherent, high quality and well messaged.

Bid Manager Role

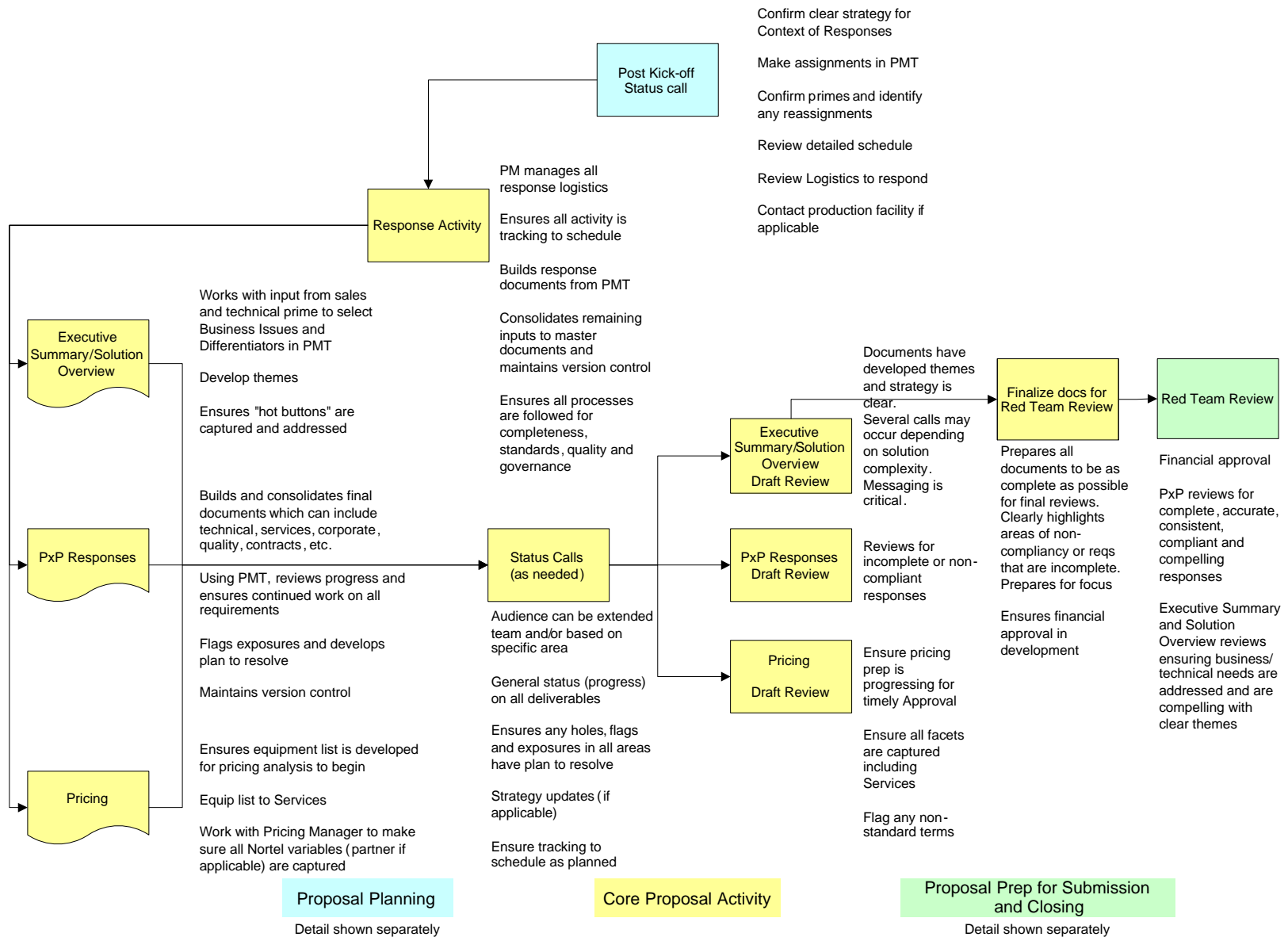


- Analysis of Project
- Team leadership and management of Project
- Quality Assurance of Project
- Resource Discovery
- Custom written content
- Global Coordination
- Content Management

Bid Management End-to-End Process Workflow



Bid Management Core Activity View



Assess Opportunities

The Opportunity Assessment Form:

- A Mechanism to trigger an Opportunity Assessment call
- Identifies specific Risks to determine whether executive level approval is needed to proceed
- Ensures visibility for effective and efficient decision making
- Intended to be stored with completed proposal or within a tool
- Learn from your history

Engineering, Configuration and Quotes

- Request received
- Opportunity assigned
- Engineer or Quote Manager analyzes request
 - Verify completeness of information
 - Check if any outside resources are required Review risk variables
- Communicate, publish turn-around. Set expectations
 - Apply discount only when known
 - Cost is provided only if requested
- Completed Opportunity and to requestor

Engineering and quote Workflow

