



# ***Managing Inter -departmental Communications for Proposal Development***



Approach, Techniques, and Methods to Stop the Horror

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# Introduction

- **Purpose:** Present an approach to create an **Interdepartmental Proposal Communications Plan (IDPCP)** to manage communications before, during, and following proposal development.
  
- **Plan:**
  - ◆ Step 1 – Determine Communication Goals and Objectives
  - ◆ Step 2 – Identify Roles and Responsibilities
  - ◆ Step 3 – Determine Data and Resources Requirements
  - ◆ Step 4 – Develop Tools and Delivery Methods/Channels
  - ◆ Step 5 – Identify Policies Impacting Proposal Development
  - ◆ Step 6 – Evaluate Communications Effectiveness





# Communications Planning Benefits

- Identifies required communications in advance
- Optimizes communications channels by defining what must be done and when
- Minimizes conflicts by setting work priorities
- Reduces last-minute demands by planning for exceptions
- Brings a semblance of order to a process often viewed as chaotic and difficult

Key: Gaining acceptance from each department is critical to developing a successful proposal communications plan.





## Step 1 - Determine Communication Goals and Objectives

1. Define overall issue or problem to be addressed
2. Assign specific and measurable outcomes
3. Create realistic, clear, and action-oriented goals and objectives for each issue or problem

**Key:** Understand and anticipate potential communications problems in order to eliminate or minimize communication lapses and reduce proposal project risks.





## Step 1 - Determine Communication Goals and Objectives

Communication Issue/Problem	Ideal Outcome	Goal/Objective
Clear understanding of <ul style="list-style-type: none"> <li>▪ key themes</li> <li>▪ solution strategy</li> </ul>	Pursuit themes and solution strategies included in the Proposal Management Plan	Capture or Business Development Manager provide prior to receipt of RFP
Lack of a dedicated Integrated Proposal Team (IPT) Resources	Assigned/dedicated IPT members	Agreement with Departmental Managers to dedicated IPT members when required
<ul style="list-style-type: none"> <li>▪ Multiple approvals required</li> <li>▪ Varies based:               <ul style="list-style-type: none"> <li>◆ price,</li> <li>◆ business unit</li> <li>◆ complexity.</li> </ul> </li> </ul>	Key managers are fully aware of proposal content and goals and are in full agreement prior to need for approval	Invite approving managers to key meetings or provide in-person briefings prior to need





## Step 2 - Identify Roles and Responsibilities

- Identify **primary** departments responsible for direct proposal support
- Identify **secondary** departments providing oversight to proposal development or approval (Legal, Human Resources, Supply, Shipping)
- Detail each departments role and responsibility
- Identify department primary and secondary contacts

### Key: Communications Objective:

Ensure all stakeholders are notified of each proposal effort, its schedule, required level of resource involvement, and required data.





## Step 2 - Identify Roles and Responsibilities

Department	Primary Contact Backup Contact	Role/Responsibility
Contracts	VP of Contracts Contracts Specialist	<ol style="list-style-type: none"><li>1. Receive and distributes official RFP to Business Development</li><li>2. Develop Teaming Agreements, NGS, etc.</li><li>3. Submit approved proposal</li></ol>
System Engineering	Director Sys, Eng. Mgr Network Eng.	<ol style="list-style-type: none"><li>1. Provide SMEs to support proposal development (System, Network, etc.)</li><li>2. Develop specification or technical documents, drawings as required</li><li>3. Develop BOEs, BOMs, etc.</li><li>4. Coordinate with Purchasing to identify components</li></ol>
Finance	VP Finance Lead Pricing Analyst	<ol style="list-style-type: none"><li>1. Support pricing strategy and development</li><li>2. Approve final price</li></ol>

**Key:** Be as detailed as possible to gain clear understanding of impact each department has directly or indirectly in proposal development





### Step 3 - Determine Data/Resource Requirements and When

- Define data/resource needs over proposal development phases:
  1. What data will be communicated
  2. When will that data be communicated
  3. What data or resource is required from their departments
  4. When must the data/resources be provided
  5. How long, or to what extent, will the resource be required





## Step 3 - Determine Data/Resource Requirements and When

Proposal Phase	Description
Capture Phase	<p>Develop preliminary proposal plans based on expected or known customer requirements. Phase lead by Business Development or Capture Manager.</p> <ol style="list-style-type: none"> <li>1. Form preliminary Integrated Proposal Team</li> <li>2. Develop initial solution based on preliminary customer requirements</li> <li>3. Develop proposal strategy</li> </ol>
Proposal Planning	<p>Develop final proposal plans based on draft or final RFP document. Phase is lead by Proposal Manager.</p> <ol style="list-style-type: none"> <li>1. Develop final Proposal Management Plan</li> <li>2. Conduct Technical Exchange Meeting to finalize solution design</li> <li>3. Develop preliminary work breakdown structure (WBS)</li> </ol>
Proposal Development	<p>Execute the proposal plan to develop proposal.</p> <ol style="list-style-type: none"> <li>1. Conduct Proposal Kick-off Meeting</li> <li>2. Develop graphics, themes, outlines, compliance matrix, solution strengths/weaknesses, solutions benefits/features, and company discriminators</li> <li>3. Develop proposal mock-up</li> </ol>
Proposal Submission	<p>Prepare and deliver final proposal package to customer.</p> <ol style="list-style-type: none"> <li>1. Obtain management and departmental approvals for final proposal document</li> <li>2. Perform proposal package audit</li> <li>3. Submit proposal</li> </ol>
Post Submission Activities	<p>Final activities to conclude proposal effort.</p> <ol style="list-style-type: none"> <li>1. Archive proposal documents</li> </ol>





## Step 3 - Determine Data/Resource Requirements and When

Department(s)		Data/Resource(s) Required	
From:	To:	Input	Output
<b>Routine Communications</b>			
Business Development/ Capture Team	Proposal Department	Monthly report on planned or scheduled RFP releases or active capture efforts	Capture/Proposal Support Plan
<b>Pre-RFP Release Planning (Also, Capture Phase)</b>			
Business Development/ Capture Team	Systems Engineering	Expected or known customer requirements	<ol style="list-style-type: none"> <li>1. Resource(s) to develop initial proposed solution</li> <li>2. Rack elevation and system architecture drawings</li> <li>3. Planned Bill of Materials (BOM)</li> </ol>
Systems Engineering	Purchasing	Planned BOM for initial cost development	Initial component costs
<b>Proposal Planning</b>			
Proposals	Systems Engineering	Draft RFP	<ol style="list-style-type: none"> <li>1. Resource(s) to lead Technical Exchange Meeting</li> <li>2. Updated proposed solution</li> <li>3. Updated rack elevation and system architecture drawings</li> <li>4. Updated planned BOM</li> </ol>
Systems Engineering	Purchasing	Updated planned Bill of Materials to update cost	Updated/negotiated component costs

**Key:** Distinguish between routine and project specific communications.





## Step 4 - Develop Tools and Delivery Methods/Channels

- Determine those tools required to create and manage required data as well as defining:
  - ◆ How, in what format:
    - The data will be communicated
    - What data must be communicated back
  - ◆ How stored during the project
  - ◆ How archived for future reference and retrieval





## Step 4 - Develop Tools and Delivery Methods/Channels

- **Communication Tools**
  - ◆ **SharePoint** – Document collaboration and storage
  - ◆ **ProPricer/Bidder** – Cost/price development
  - ◆ Various **proposal knowledge base tools**
  - ◆ **Microsoft Office** – Word processor, spreadsheet, email and calendar tool
  - ◆ **Microsoft Office Project** – Program schedule and work breakdown structure (WBS)
  - ◆ **Adobe Illustrator** – Graphics design
- **Additional**
  - ◆ **Departmental Procedures, Work Instructions, Forms**





## Step 4 - Develop Tools and Delivery Methods/Channels

Data	Development Tool(s)	Communications Method(s)/ Channel(s)	Storage
<b>Pre-RFP Release Planning (Also, Capture Phase)</b>			
Initial Proposed Solution	Microsoft Word Microsoft Visio	Email – for initial review and distribution SharePoint – Project Folder for general access Microsoft PowerPoint – Presentation to Blue Team	SharePoint
<b>Proposal Planning</b>			
Proposal Management Plan	Microsoft Word	Kick-off Meeting – distribute hardcopy to team	SharePoint
<b>Proposal Development</b>			
Basis of Estimates	ProBidder	View at Review Meetings	ProBidder
Proposal Content	Microsoft Word	SharePoint – for management by proposal technical writer	Sharepoint
Final Bill of Materials	ProBidder	View at Cost Review Meetings	ProBidder
<b>Proposal Submission</b>			
Final Proposal Documents	Microsoft Word, Excel, Project	Email to customer	SharePoint

**Key:** Management and customer policies can determine how and when communications are developed and executed and what tools, methods, and channels required.





## Step 5 - Policies Impacting Proposal Development

- Policies can be both formal and informal such as:
  - ◆ Proposal Operations
    - Resource allocations and use
    - Budgeting
  - ◆ Proposal/Pricing Reviews
  - ◆ Proposal Approval/Signature Process
  - ◆ Customer Communications Management
    - Submission of Questions
    - Contact with customer before, during, and following submission (formal vs. informal)





## Step 5 - Polices Impacting Proposal Development

- Policies can be both formal and informal such as:
  - ◆ Legal reviews
  - ◆ Contracts
    - Terms and Conditions
    - FAR
    - International Traffic in Arms Regulations (ITAR)
    - Non-disclosure Agreements (NDAs)
    - Teaming Agreements
    - Vendor Agreements
    - Submission and formal communications with customer/vendors





## Step 6 - Evaluate Communications Effectiveness

- Evaluate if:
  - ◆ Data:
    - Properly sent/requests complete
    - Met expectations
    - Timely
  - ◆ New data requirements uncovered
  - ◆ New policy initiatives
  - ◆ Unique problems/root causes
  - ◆ Recommendations to improve communications





## Work Environments Impact on Communications

- Proposal Team
  - ◆ Proximity
    - Single location
    - Multiple locations/Virtual Teams
  - ◆ Organizational Approach
    - Full Time
    - Part Time/Contractor (Matrix/Virtual)
  
- Communications Approach Determinates:
  - ◆ Team Size
  - ◆ Proposal Complexity
  - ◆ Communications Infrastructure Support
  - ◆ Project Timeline





## Work Environments Impact on Communications

Team Proximity Communications Opportunity Costs:

- ◆ **Synergy** – Spontaneity and real-time team interaction
- ◆ **Time** – Formal and Informal information flows quickly
- ◆ **Miscommunication** – Minimized through instant feedback and interaction
- ◆ **Leadership** – Continual and available for interaction
- ◆ **Travel** – None to minimum
- ◆ **Extended-hour Coverage** – Use time zones to schedule work to extend workday vs. overtime
- ◆ **Specialization** – Local availability of specialized skill sets

**Key:** Team proximity's has a significant impact on team communications.





## Work Environments Impact on Communications

Team Organizational Approach Communications

Opportunity Costs:

- ◆ **Accountability** – Single point of accountability
- ◆ **Training** – Utilize just-in-time techniques
- ◆ **Working Relationships** – Team dynamics and relationship building

**Key:** Teams need to be brought together under a clear vision, common purpose, and understanding.





# Proposal Communications Security

- Data available will make the difference between winning and losing. Your own and your competitors.
- Some basic steps:
  - ◆ Training
  - ◆ Email: Security and Risk
  - ◆ Network Isolation (including archives)
  - ◆ Information Storage and Disposal
  - ◆ Restricted Access to proposal team and assets

**Key:** Data (proprietary, sensitive, or even seemingly harmless operational data), alone or when combined with other information, may adversely affect your ability to compete.





# Conclusion

- Keys to successfully managing inter-departmental communications:
  - ◆ Gain acceptance from each department required to support proposal development
  - ◆ Demonstrate a clear benefit offered by following a communications plan
  - ◆ Predictability and consistently follow the plan

