

SPEAKER NOTES: Destination 3.0

SLIDE 1

This presentation will outline how one company took on the BD CMM and committed to applying both repeatable and defined business development (BD) practices. The presentation will tell the engaging story of how a strong organization with an enviable culture attempted to strengthen its BD practices without breaking its entrepreneurial spirit.

SLIDE 2

Take-aways for any team - not required to perform a full assessment/implementation/reassessment approach

Tools here are available to all, whether you bring in BDII or not

Lot's to cover and Q&A at the end, please hold unless you feel the question is critical to understanding the topic at hand

Also, the pictures used in this deck have significant meaning to me. If we have time at the end I will share with you the stories behind the images and why I chose them for use in this presentation

SLIDE 3

LAUNCHING THE INITIATIVE

The Catalysts

- Growing organization (but not predictable or easily managed growth)

- Balancing best practices and an entrepreneurial spirit of innovation

- Background and history of LCE + Initial assessment from BDII

 - MAR stagnant growth and need for a new market

 - RFP releases were watched, but we were too late

 - So we had pull from the field, but just from one of our regions / within one of our business groups

One of the reasons that this effort gained traction back in 2010 is that we were beginning a very deliberate transition in the position of CEO from our founder to his son

It also occurs to me that In today's environment this is a very timely topic - with sequestration and shrinking government budgets, we (especially those of us in government contracting) are being forced to consider how productive our BD efforts are and how to maximize our reach.

SLIDE 4

LCE is an engineering firm, 37 years old

HQ in Charleston SC

Navy Contracts

Manufacturing consulting

Applied Technology

All under the premise that predictable maintenance is better than reactive shut-downs

500ish employees

\$100M

That growth has come in a consistently upward trend, but not always in a smooth ride

SLIDE 5

Culture at LCE

History of BD at LCE - we have won our work and grown our business through high quality delivery and stellar technical reputations

In events that require proposals, gurus sprung up in unlikely places and no one fully understood or owned the total BD picture

SLIDE 6

Now, back to this one region crying out in the darkness for improved BD practices

They did some research and found BDII

They brought this to LCE's corporate BD team - remember that confounded entrepreneurial spirit? Well...

Enter BDII based on a call to incorporate from one of our regions within one of our groups

They worked their magic through surveys, data calls, case studies and interviews

Then came the analysis that ended with LCE's rating as a LEVEL ONE... AD/HOC

The BD-CMM tool provides descriptions of behaviors characteristics to various levels in each of the Key Process Areas

- How do you manage response generation

- How do you develop solutions

- How do you gain approval for BD pursuits

- How do you allocate limited resources across varying demands

There are NO descriptions for LEVEL 1 - all the answers would be 'AD-HOC'

LEVEL 2: Repeatable

LEVEL 3: Defined

LEVEL 4: Managed

LEVEL 5: Optimizing

SLIDE 7

LCE was issued with our assessment out-brief 8 recommendations

We were told that if we addressed these 8 recommendations that we could be a **Level 3 organization in 18 months**

We targeted LEVEL 3 because we felt we could get there and we believed that Level 3 was a place where we could achieve our goals of sustainable and predictable growth that was April 12, 2010

Notice that these 8 recommendations are not easy and not fast and also not for the faint of heart

SLIDE 8 <POLL>

Revisiting the BD-CMM

Who thinks that they work in a LEVEL 1 environment: _____; what are some characteristics that make you choose this level

Level 2: _____; what are some characteristics that make you choose this level
Level 3: _____; what are some characteristics that make you choose this level
Level 4: _____; what are some characteristics that make you choose this level
Where are my liars? Who is in a Level 5 environment: _____; what are some characteristics that make you choose this level

SLIDE 9

BUILDING A PROCESS

So we set to work

We called in stakeholders from each of our business groups and from the corporate services team

We based our process on a mash-up of Shipley (backbone), Miller Heiman (LAMP) and Sales

Performance International (SOLUTION SELLING)

SLIDE 10

We had some unique requirements

Remember that confounded entrepreneurial spirit?

Our BD process needed to fit LCE (commercial and government business groups)

SLIDE 11

And here she is in all of her glory - the LCE BD Process

- Documentation - silverlight, don't worry this thing is scalable!

- BD Process Manual Version 1.0

- IN ADDITION TO Designing tools that support the process

SLIDES 12 and 13

Web based version of the BD Process complete with roles and responsibilities, access to tools, process step descriptions...etc.

SILVERLIGHT DESCRIPTION:

Microsoft Silverlight is an [application framework](#) for writing and running [rich Internet applications](#), with features and purposes similar to those of [Adobe Flash](#). The [run-time environment](#) for Silverlight is available as a [plug-in](#) for [web browsers](#) running under Microsoft Windows and OS X. While early versions of Silverlight focused on [streaming media](#), current versions support [multimedia](#), [graphics](#), and animation, and give developers support for [CLI languages](#) and [development tools](#). Silverlight is also one of the two application development platforms for [Windows Phone](#), but web pages which use Silverlight cannot run on the Windows Phone or [Windows Mobile](#) versions of [Internet Explorer](#), as there is no Silverlight plugin for Internet Explorer on those platforms.^[5]

Other tools are available too, but we chose Silverlight

SLIDE 14

IMPLEMENTING THE PROCESS

We faced application of change management in an agile, but 'well set' company culture

To make matters worse (or better depending on how you look at it) we were the first and remain one of a very few certified teachers of PROSCI change management methodology

Prosci's change management methodology is based on research with over 2600 participants over the last fourteen years. What is unique about the methodology is that it comes from **real project leaders and teams** reflecting on what worked, what did not and what they would do differently on their next projects.

At its core, Prosci's methodology is the collective lessons learned by those introducing change across the

globe. Based on this research, Prosci's goal has been to develop a methodology that is holistic and at the same time easy to use. The resulting process, tools and assessments have been developed with one goal in mind: that **you** can put them to use on your projects, building **your** (and your organization's) own internal change management skill set. Below is a high-level overview of Prosci's methodology.

SLIDE 15

Prosci emphasizes effecting change through communicating the What, Why and Risk related to behaving differently

And inspiring individual changes in behavior through the assessment of ADKAR

Like the five stages of grief these cannot be skipped

We leveraged these 'best practices' throughout our implementation and we tracked some metrics associated with adoption and we found...

SLIDE 16

Louis L'Amour was right

SLIDE 17

AND Bill Scheessele is right - except in that he ran this under a column header marked OPINION - I assure you that this is a FACT!

SLIDE 18

So at the beginning of 2013, we had accomplished the following:

- created a corporate strategic plan
- established a role for leadership of BD
- developed a process, documented a process
- stood up the BDRC (LCE's version of a proposal center)
- trained for BD skills
- dabbled in account planning
- enhanced our infrastructure significantly
- measured against KPIs

And we decided to perform a REASSESSMENT OF OUR PROGRESS

We chose to perform an *internal* BD assessment

Cons:

I had to do it

It's hard to be a prophet in your own land

It takes time

It requires a complete understanding of the BD CMM

Pros:

We know our unique BD Process

It's faster

It's simpler

It's easier to schedule

It requires a complete understanding of the BD CMM

SLIDE 19

The reassessment was run much like the BDII's initial reassessment

We removed as much subjectivity as possible by seeking to find evidence on the following two questions:

- if this exact scenario presented itself again would we respond the same way = REPEATABLE
- if so, is there a documented process to follow in order to guarantee the same results time after time = DEFINED

SLIDE 20

Gaps and Corresponding action plans

Company average = 2ish

Some had not really gotten started = Level 1

Some were trending close to Level 3

Guess where the region that called for this was????

SLIDE 21

And we also found that with some we were still walking along this same little path that we looked at before

SLIDE 22

So what do we do? We move onward...

Fortunately, LCE's leadership is staying the course and driving on toward both repeatability and definition in BD behaviors, believing that the payoff will be sustainable growth and a more stable environment for employees.

SLIDE 23

Three major focus areas

Keep it simple

Continue to lean on best practices and our change management tools

SLIDE 24

We report bi-weekly on four key metrics:

- pipeline management
- recent awards and losses (self explanatory)
- proposal management
- BDRC activities

SLIDE 25

Pipeline management

SLIDE 26

Proposal Management

SLIDE 27 - 29

BDRC Activity

SLIDE 30

Conclusions -

Did we strengthen our BD practices = YES, but more ground to cover

Did we break our entrepreneurial spirit? = Unfortunately not ;)

Slide 31

Reference the 6 on the slide

* you get what you measure - ESTIMATED Revenue by phase 3 (minimums set to \$1000 and we had many opportunities with \$1001.00 as estimated revenue)

Plus make this point:

We slow rolled our implementation... but those who have adopted it truly believe it

WHAT WHY and RISK (risk to the individual)

SLIDE 32

Q&A

SLIDE 33

Photo credits

The path forward

Tips for others based on current BDCMM levels