



# From Start to Finish: Building a Proposal Schedule That Works

David M. Stearman

March 22, 2018



# Agenda

- WHY is a Schedule Important?
- Two Common Approaches
- Challenges of the Two Most Common Approaches
- A Third Way
- Building a Proposal Schedule: Summary
- Detailed Step-by-Step Procedures to Build a Schedule
- Now What?
- Questions







# WHY is a Schedule Important?

- Resource management



# WHY is a Schedule Important?

- Resource management



# WHY is a Schedule Important?

- Resource management



# WHY is a Schedule Important?

- Resource management





# WHY is a Schedule Important?

- Resource management





# WHY is a Schedule Important?

- Resource management
- Roadmap





# WHY is a Schedule Important?

- Resource management
- Roadmap
- Clarity and focus





# WHY is a Schedule Important?

- Resource management
- Roadmap
- Clarity and focus
- Stress reduction



# WHY is a Schedule Important?

- Resource management
- Roadmap
- Clarity and focus
- Stress reduction
- Risk reduction





# Two Common Approaches





# Two Common Approaches

- Begin at the beginning





# Two Common Approaches

- Begin at the beginning







# Two Common Approaches

- Begin at the beginning



- Begin at the end



# Two Common Approaches

- Begin at the beginning



- Begin at the end





# Challenges of the “Start at the Beginning” Approach

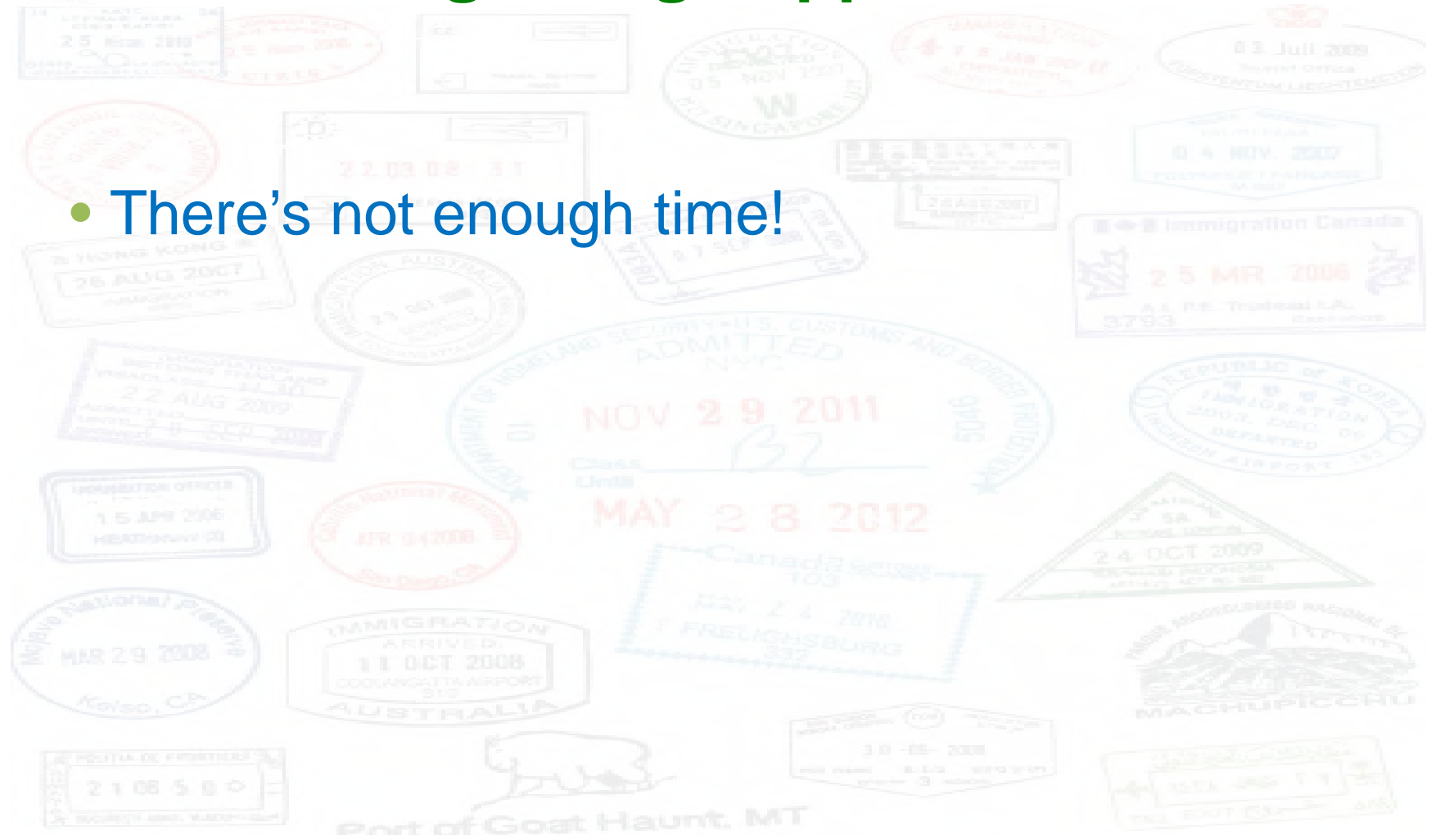


Part of Goat Haunt, MT



# Challenges of the “Start at the Beginning” Approach

- There’s not enough time!





# Challenges of the “Start at the Beginning” Approach

- There’s not enough time!
- Compressed production/QC



# Challenges of the “Start at the Beginning” Approach

- There’s not enough time!
- Compressed production/QC
- Omitted steps → additional risk



# Challenges of the “Start at the Beginning” Approach

- There’s not enough time!
- Compressed production/QC
- Omitted steps → additional risk
- Chaos, stress, long hours





# Challenges of the “Begin at the End” Approach



Part of Goat Haunt, MT





# Challenges of the “Begin at the End” Approach

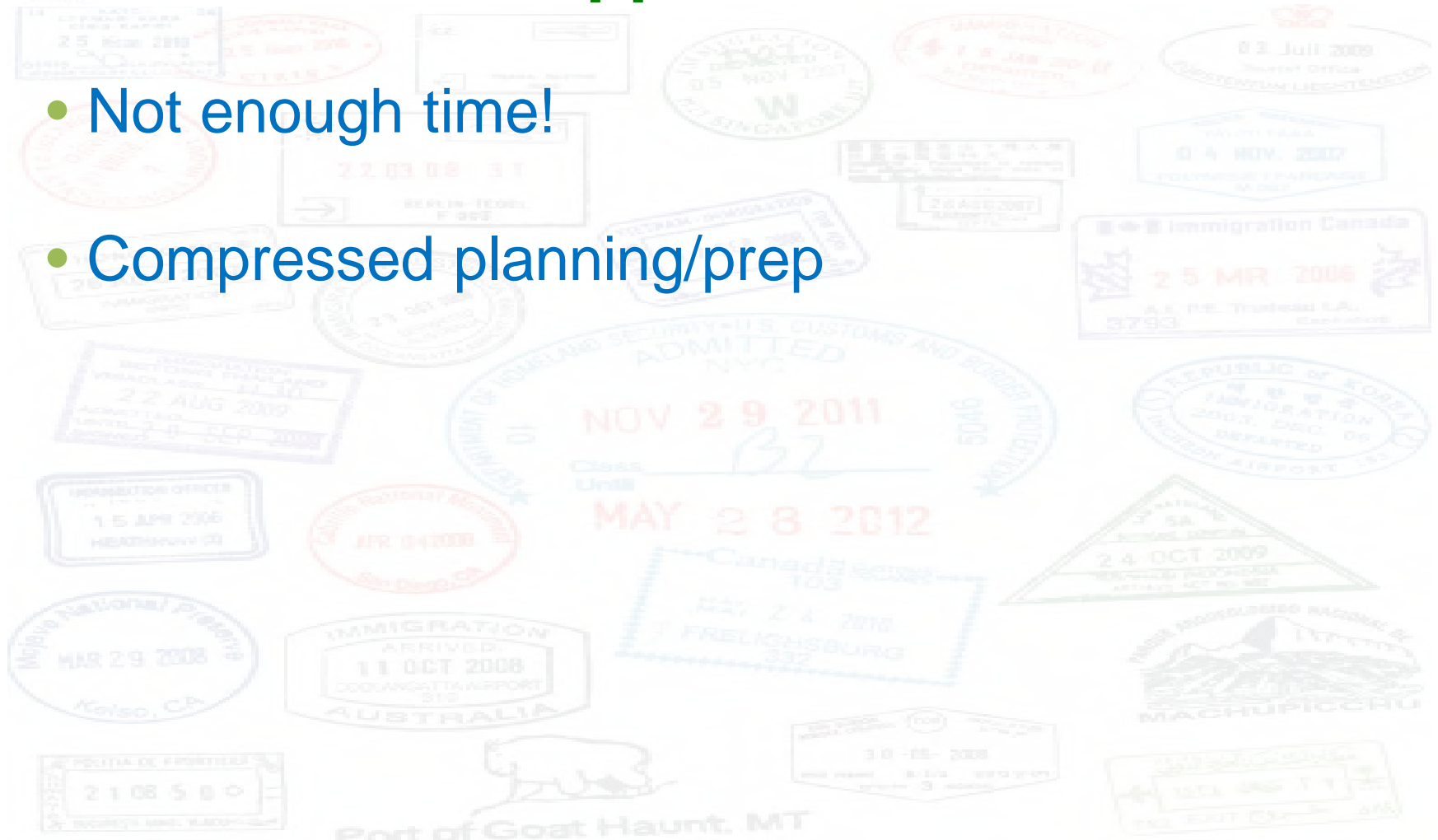
- Not enough time!





# Challenges of the “Begin at the End” Approach

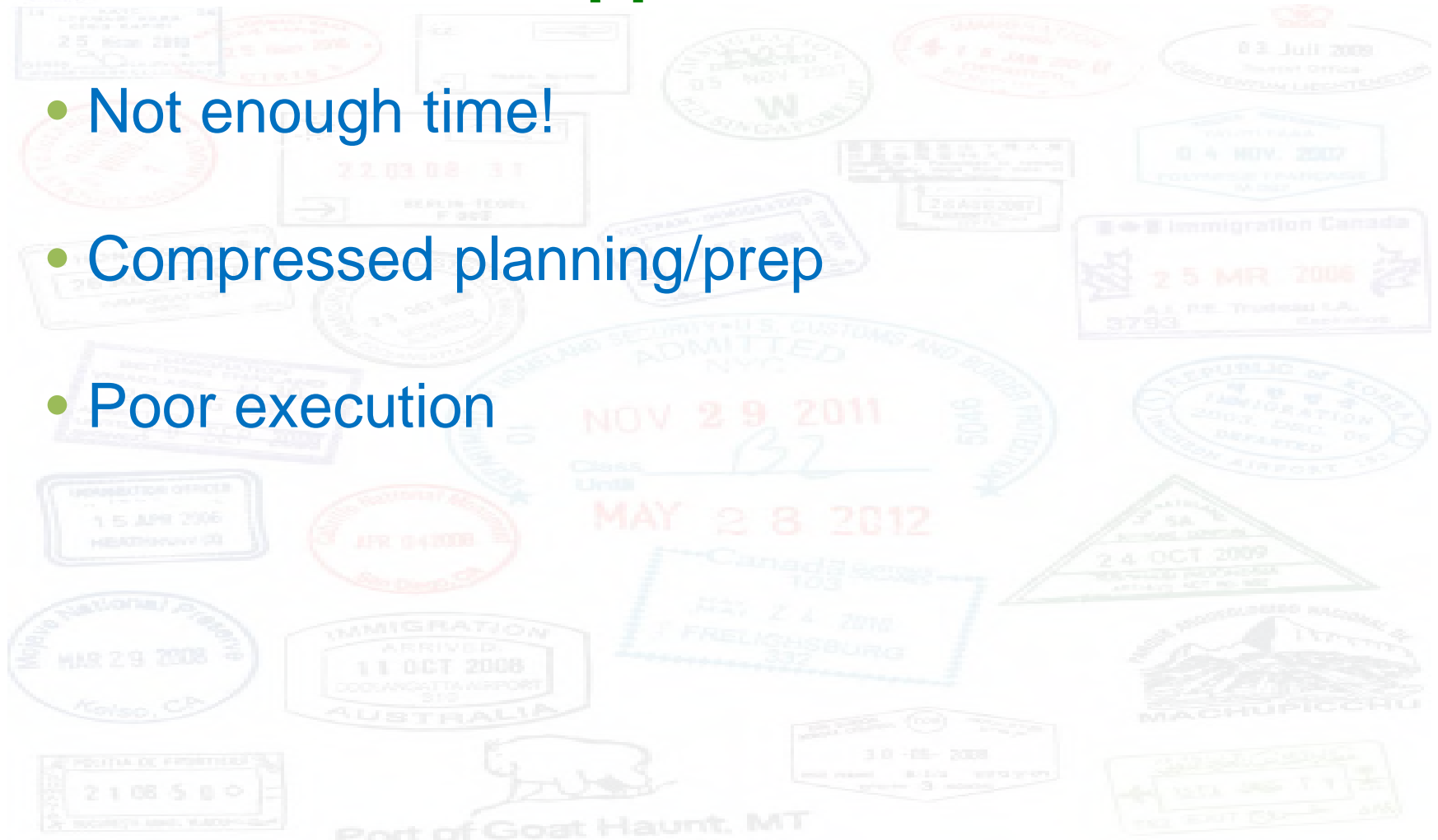
- Not enough time!
- Compressed planning/prep





# Challenges of the “Begin at the End” Approach

- Not enough time!
- Compressed planning/prep
- Poor execution





# Challenges of the “Begin at the End” Approach

- Not enough time!
- Compressed planning/prep
- Poor execution
- Omitted steps → additional risk



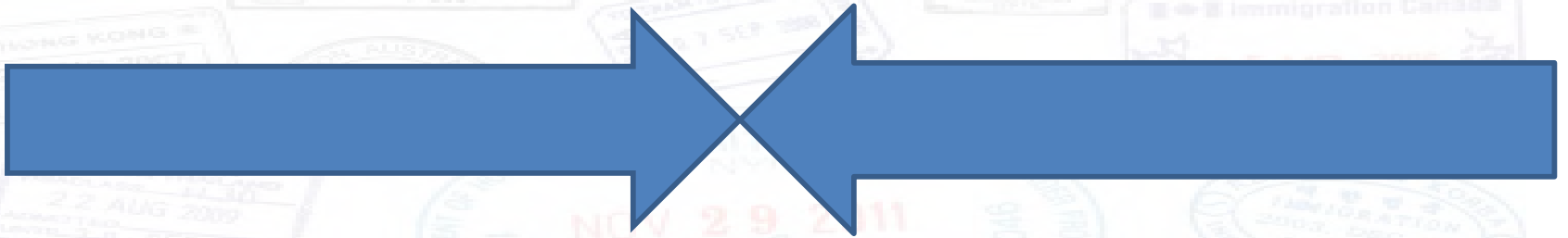


# A Third Way: Work Toward the Middle





# A Third Way: Work Toward the Middle





# WHY Work Toward the Middle?

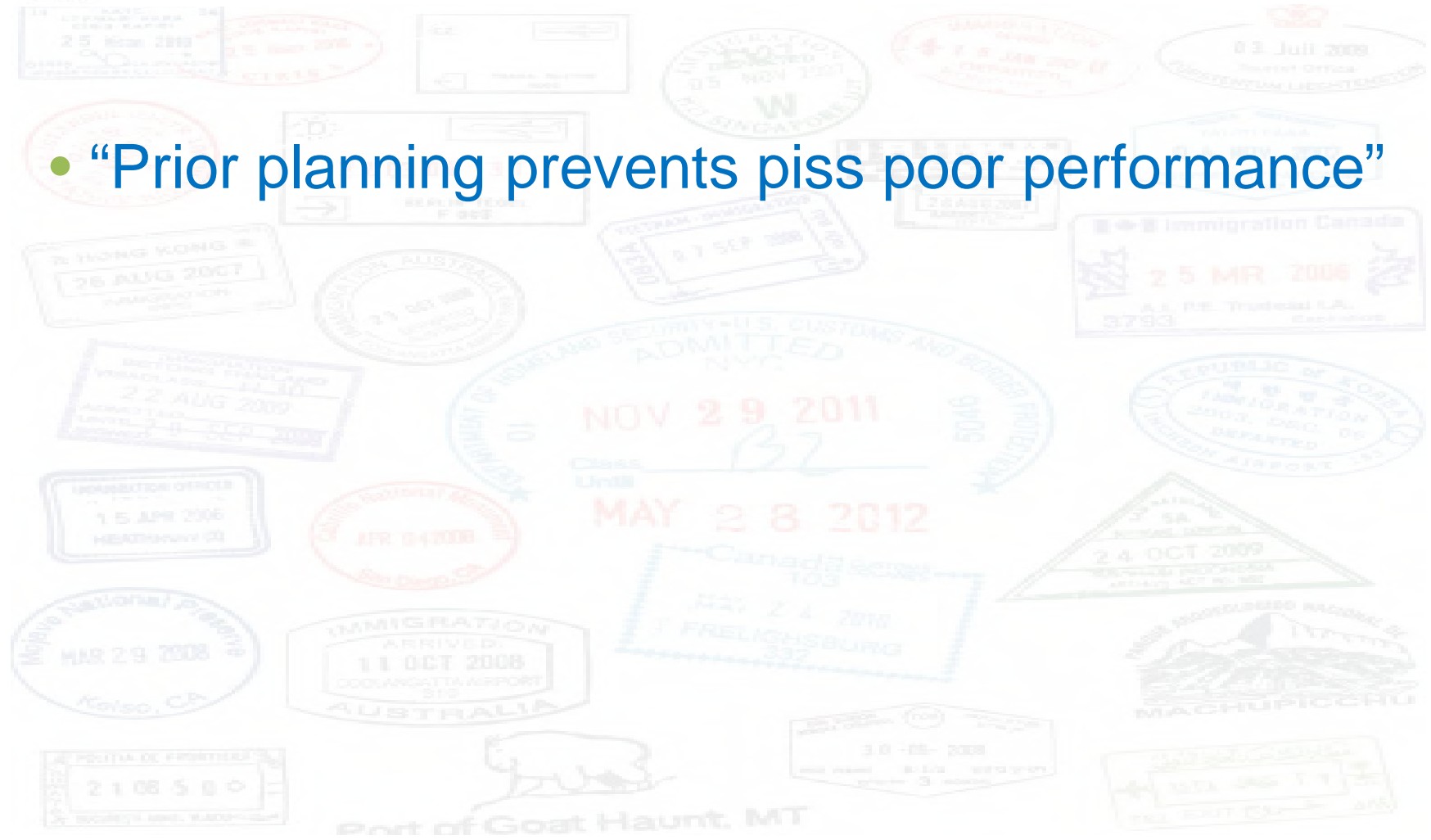


Part of Goat Haunt, MT



# WHY Work Toward the Middle?

- “Prior planning prevents piss poor performance”







# WHY Work Toward the Middle?

- “Prior planning prevents piss poor performance”
- Quality matters!

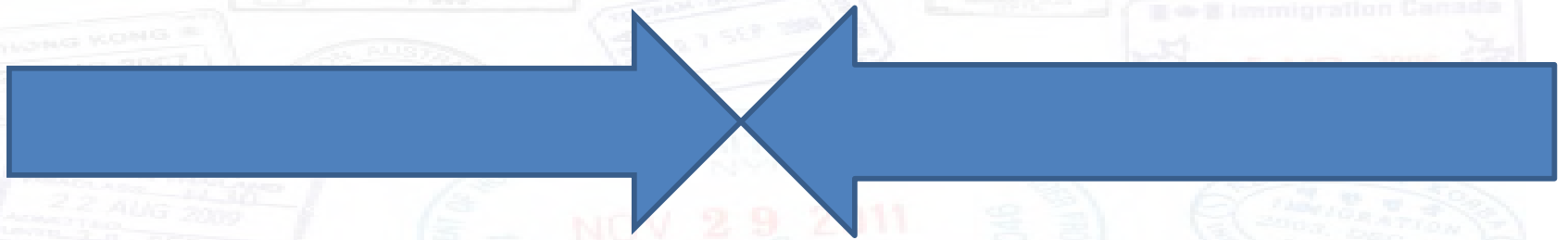


# WHY Work Toward the Middle?

- “Prior planning prevents piss poor performance”
- Quality matters!
- Making time for what’s most important



# Work Toward the Middle





# Building a Proposal Schedule: Summary

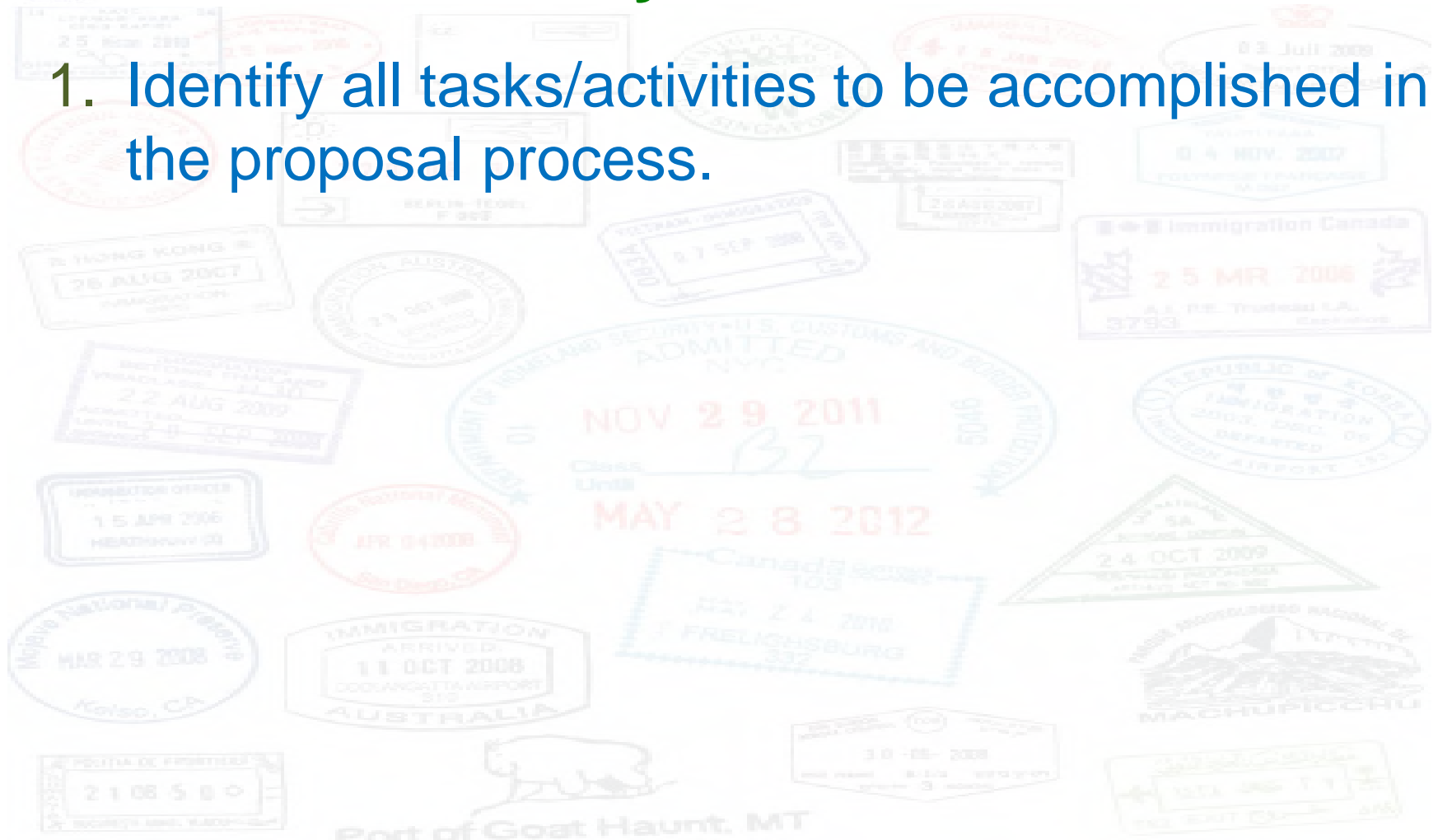


Part of Goat Haunt, MT



# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.





# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.



# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.
3. Identify dependencies.



# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.
3. Identify dependencies.
4. Identify independencies.





# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.
3. Identify dependencies.
4. Identify independencies.
5. Take a “first pass” at building your schedule.



# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.
3. Identify dependencies.
4. Identify independencies.
5. Take a “first pass” at building your schedule.
6. Vet the initial schedule with relevant stakeholders.



# Building a Proposal Schedule: Summary

1. Identify all tasks/activities to be accomplished in the proposal process.
2. Assign a time period required to accomplish each step.
3. Identify dependencies.
4. Identify independencies.
5. Take a “first pass” at building your schedule.
6. Vet the initial schedule with relevant stakeholders.
7. Modify the schedule as necessary.



# Step 1: Identify All Tasks/Activities





# Proposal Tasks: Examples





# Proposal Tasks: Examples

- Read RFP
- Create proposal outline
- Create proposal schedule
- Bid/No-Bid gate review
- Proposal Kickoff
- Solution development
- Storyboarding
- Writing
- Price-to-Win analysis
- Develop graphics



# Proposal Tasks: Examples

- Read RFP
- Create proposal outline
- Create proposal schedule
- Bid/No-Bid gate review
- Proposal Kickoff
- Solution development
- Storyboarding
- Writing
- Price-to-Win analysis
- Develop graphics
- Send RFPs to subs
- Develop pricing
- Red Team review
- Proposal revisions
- Gold Team review
- DTP/Editing
- White Glove review
- Final production
- Book check
- Deliver proposal



# Step 2: Assign Timeframes







# Step 2: Assign Timeframes

Task/Activity	Time Required (est.)
Read RFP	1 day
Create proposal outline	2 hours
Create proposal schedule	2 hours
Bid/No-Bid gate review	1 hour (+ 3 hours prep)
Proposal Kickoff	1 hour (+ 3 hours prep)
Solution development	1 day
Storyboarding	1 day
Writing	3–7 days
Price-to-Win analysis	5 days
Develop graphics	1 day



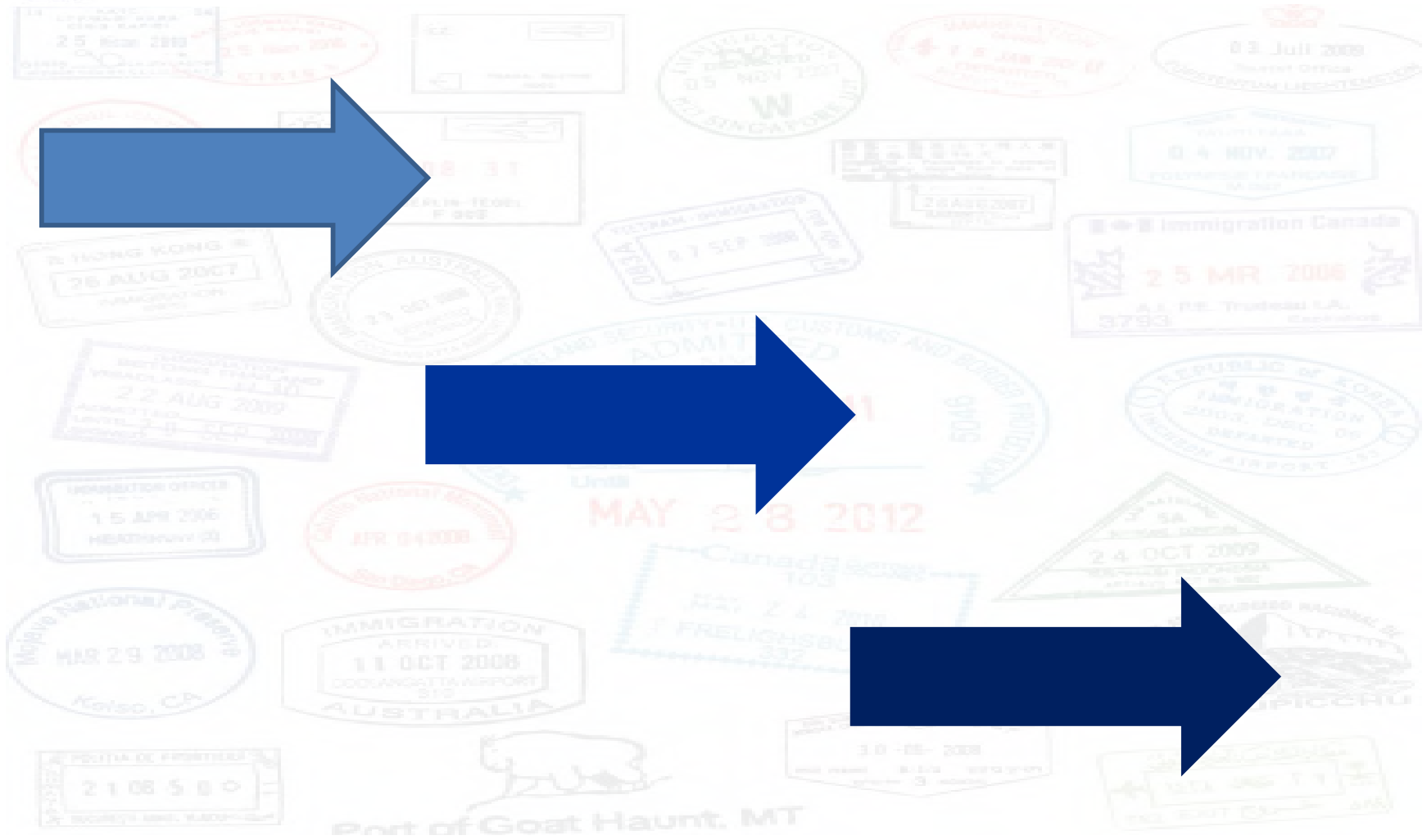
# “Standard” Pace

Task/Activity	Standard Pace
Writing	1–2 pages/hour
Desktop publishing (formatting)	10–12 pages/hour
Copy editing	4–5 pages/hour
Reviewing	1–2 pages/hour
Graphics development	2 hours/graphic (simple) 4–5 hours/graphic (complex)





# Step 3: Identify Dependencies



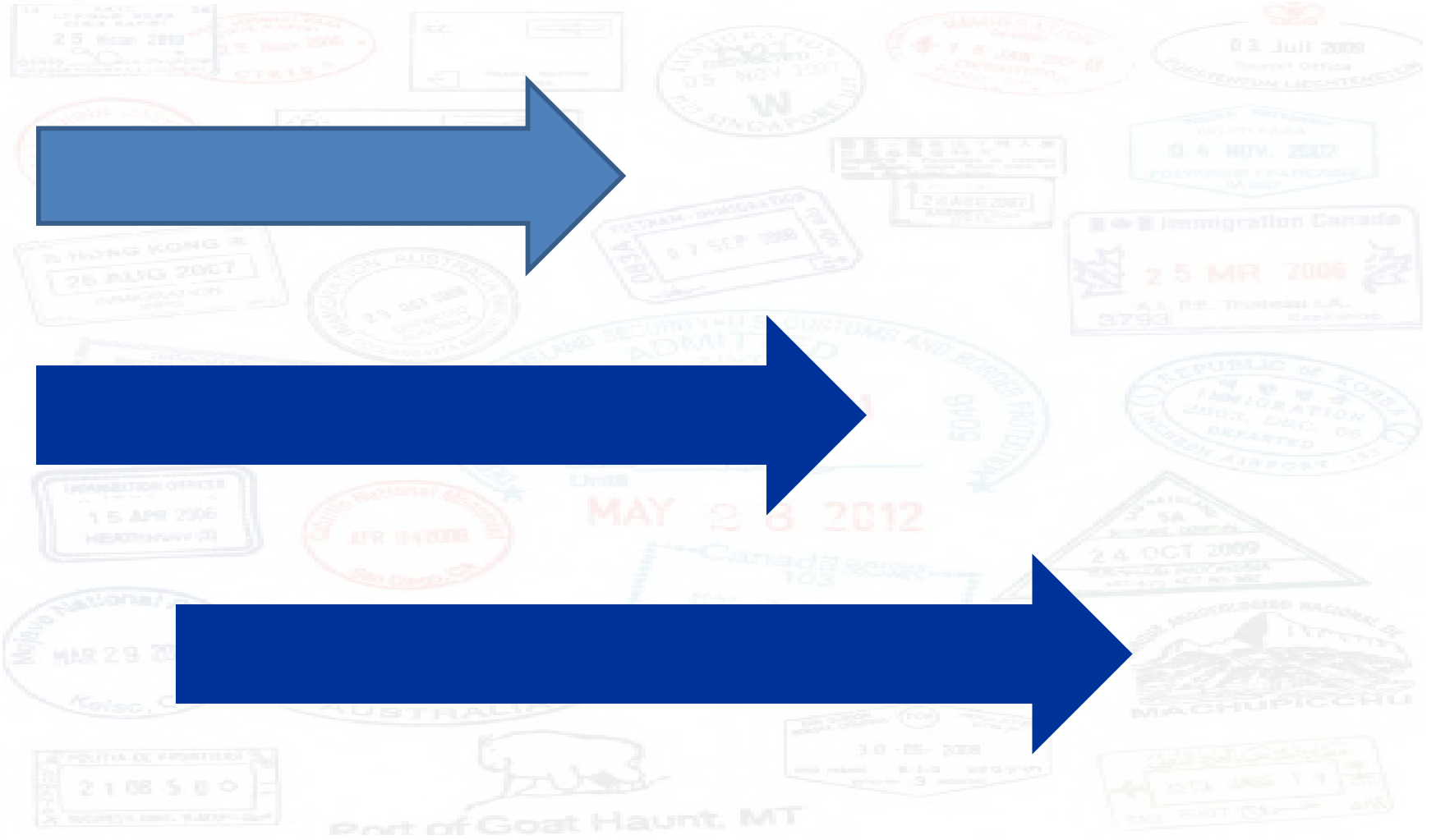


# Step 3: Identify Independencies





# Step 3: Identify Independencies





# Step 5: Create an Initial, “First Pass” Schedule



Part of Goat Haunt, MT



# Step 5: Create an Initial, “First Pass” Schedule

Calendar for the month of \_\_\_\_\_

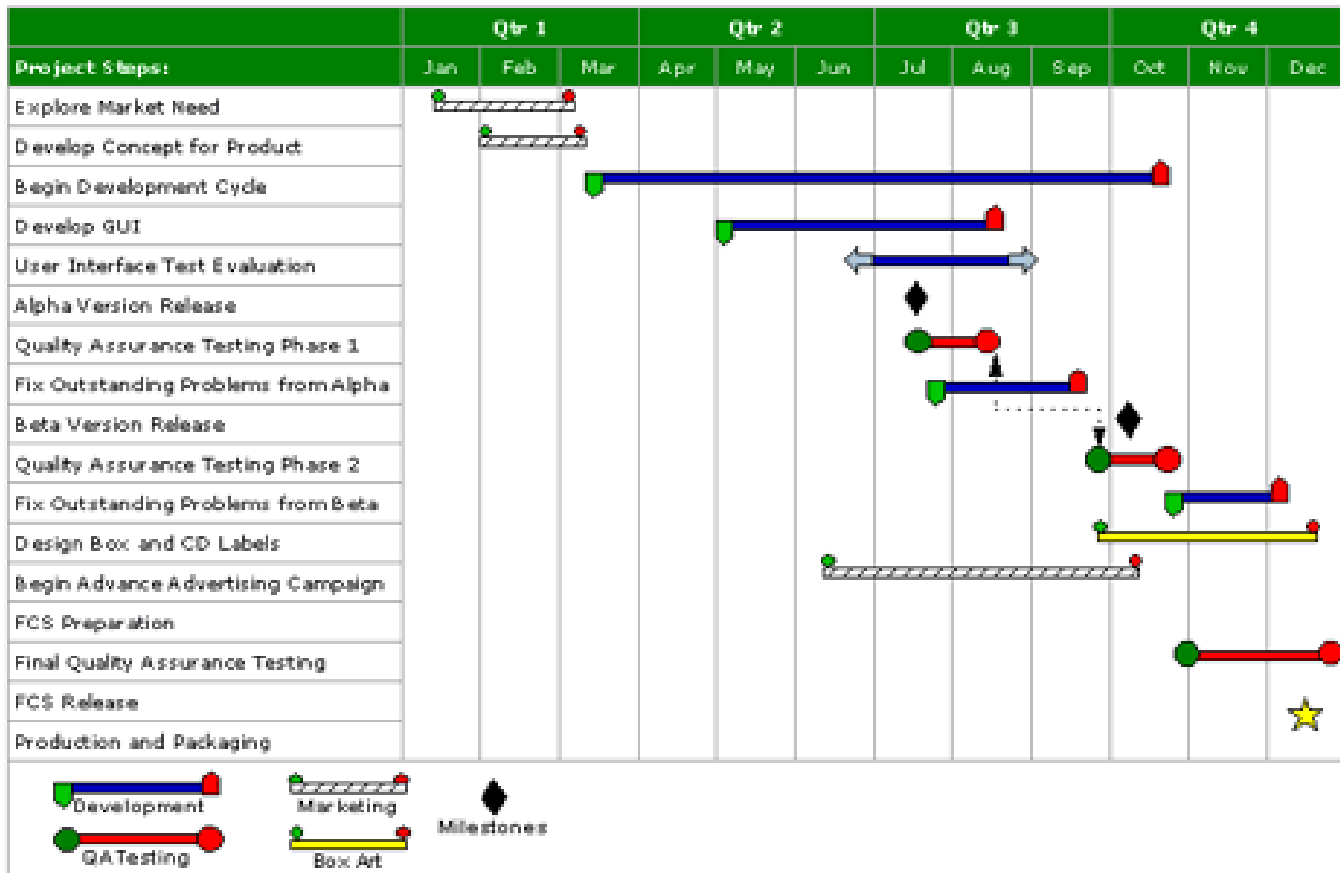
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday





# Step 5: Create an Initial, “First Pass” Schedule

## Project Development Schedule

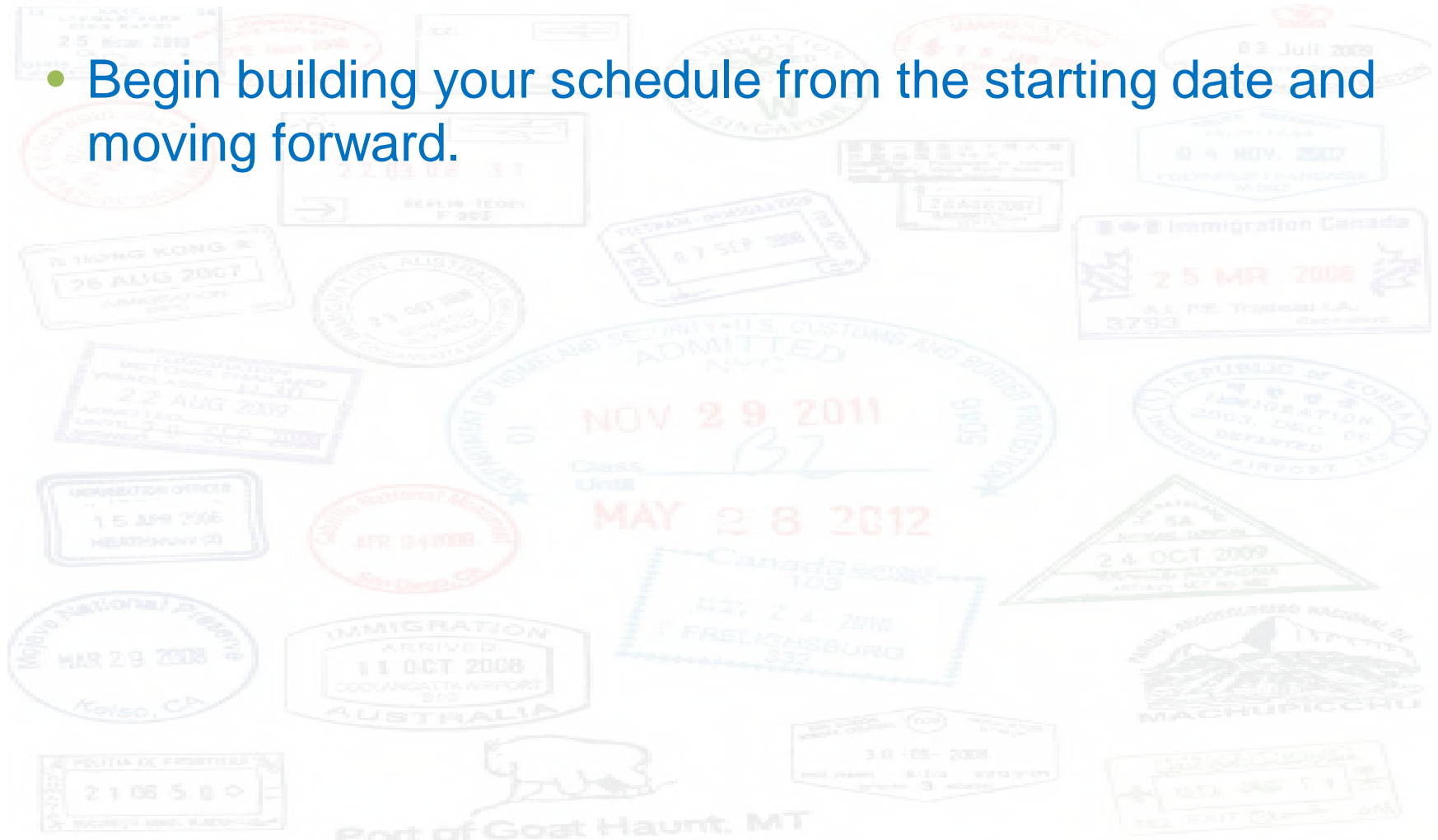






# Step 5a: Begin at the Beginning

- Begin building your schedule from the starting date and moving forward.





# Step 5a: Begin at the Beginning

- Begin building your schedule from the starting date and moving forward.
- Allow the full amount of estimated time for the key activities at the beginning of the process.



# Step 5a: Begin at the Beginning

- Begin building your schedule from the starting date and moving forward.
- Allow the full amount of estimated time for the key activities at the beginning of the process.
- When you reach the point in the schedule at which writing would begin, **PAUSE**.



# Step 5a: Begin at the Beginning

- Begin building your schedule from the starting date and moving forward.
- Allow the full amount of estimated time for the key activities at the beginning of the process.
- When you reach the point in the schedule at which writing would begin, **PAUSE**.





# Step 5a: Begin at the Beginning

- Begin building your schedule from the starting date and moving forward.
- Allow the full amount of estimated time for the key activities at the beginning of the process.
- When you reach the point in the schedule at which writing would begin, **PAUSE**.



- Proceed to step 5b.

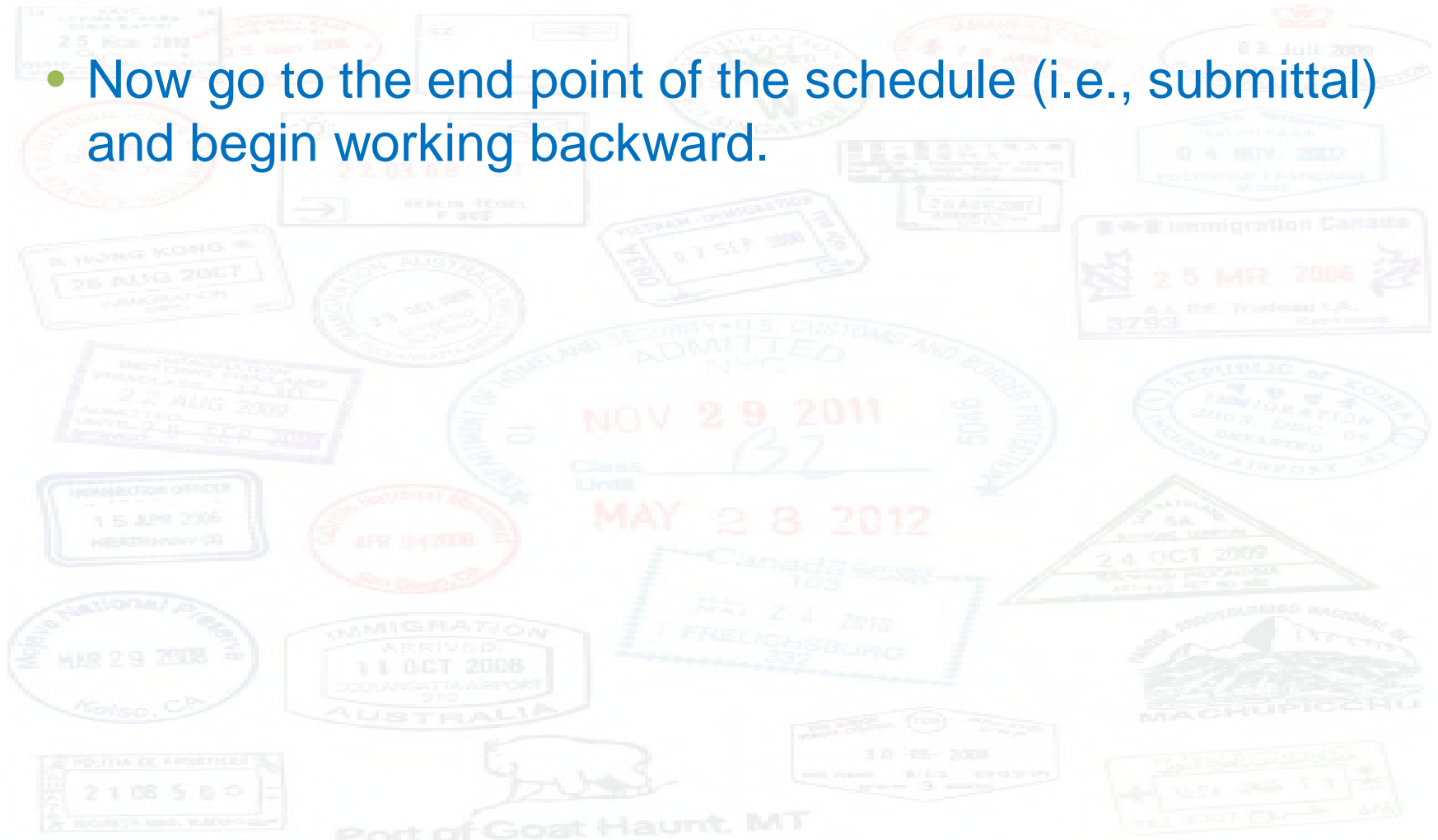






# Step 5b: Begin at the End

- Now go to the end point of the schedule (i.e., submittal) and begin working backward.





# Step 5b: Begin at the End

- Now go to the end point of the schedule (i.e., submittal) and begin working backward.
- Allow the full amount of estimated time for the key activities at the end of the process.



## Step 5b: Begin at the End

- Now go to the end point of the schedule (i.e., submittal) and begin working backward.
- Allow the full amount of estimated time for the key activities at the end of the process.
- When you reach the point in the schedule at which the final review is concluded, **PAUSE**.



## Step 5b: Begin at the End

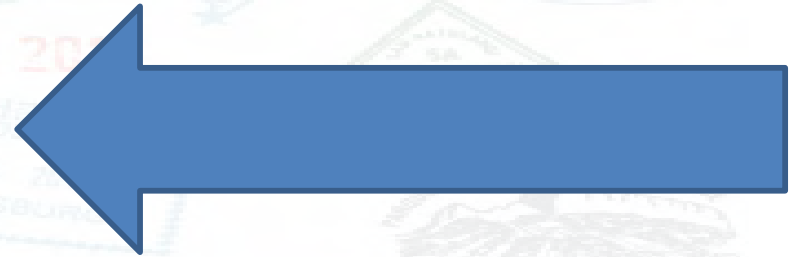
- Now go to the end point of the schedule (i.e., submittal) and begin working backward.
- Allow the full amount of estimated time for the key activities at the end of the process.
- When you reach the point in the schedule at which the final review is concluded, **PAUSE**.





## Step 5b: Begin at the End

- Now go to the end point of the schedule (i.e., submittal) and begin working backward.
- Allow the full amount of estimated time for the key activities at the end of the process.
- When you reach the point in the schedule at which the final review is concluded, **PAUSE**.
- Proceed to step 5c.







# There's Not Enough Time!





# There's Not Enough Time!

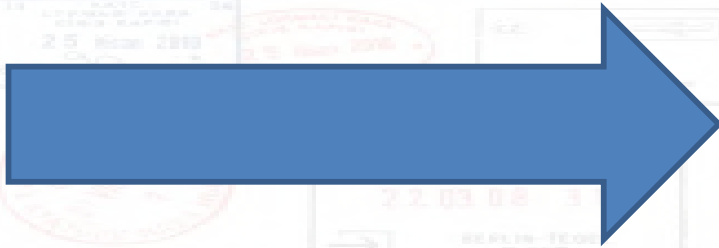


- Resist the urge to immediately compress (or eliminate) key tasks at the beginning or end of the process. Instead, compress the time for writing and reviewing.





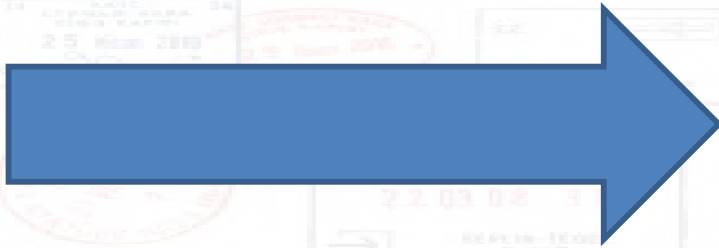
# There's Not Enough Time!



- Resist the urge to immediately compress (or eliminate) key tasks at the beginning or end of the process. Instead, compress the time for writing and reviewing.
- If all else truly fails, then and only then consider compressing key tasks at the beginning or end.



# There's Not Enough Time!



- Resist the urge to immediately compress (or eliminate) key tasks at the beginning or end of the process. Instead, compress the time for writing and reviewing.
- If all else truly fails, then and only then consider compressing key tasks at the beginning or end.
- If even that fails, and as an absolute **last resort**, consider omitting some tasks.





# There's Really Not Enough Time!





# There's Really Not Enough Time!



- If your schedule-from-the-beginning and schedule-from-the-end overlap even before you fill in the activities in the middle, you obviously have a more serious problem.



# There's Really Not Enough Time!



- If your schedule-from-the-beginning and schedule-from-the-end overlap even before you fill in the activities in the middle, you obviously have a more serious problem.
- Again, consider compressing (or, as a last resort, omitting) activities at the beginning or end.



# There's Really Not Enough Time!



- If your schedule-from-the-beginning and schedule-from-the-end overlap even before you fill in the activities in the middle, you obviously have a more serious problem.
- Again, consider compressing (or, as a **last resort**, omitting) activities at the beginning or end.
- If your schedule still doesn't have enough time for what you need to do, it's a sign that you should consider a **No Bid**. You probably have failed to prepare adequately and therefore are likely to fail in the pursuit regardless.



# Step 6: Vet the Initial Schedule

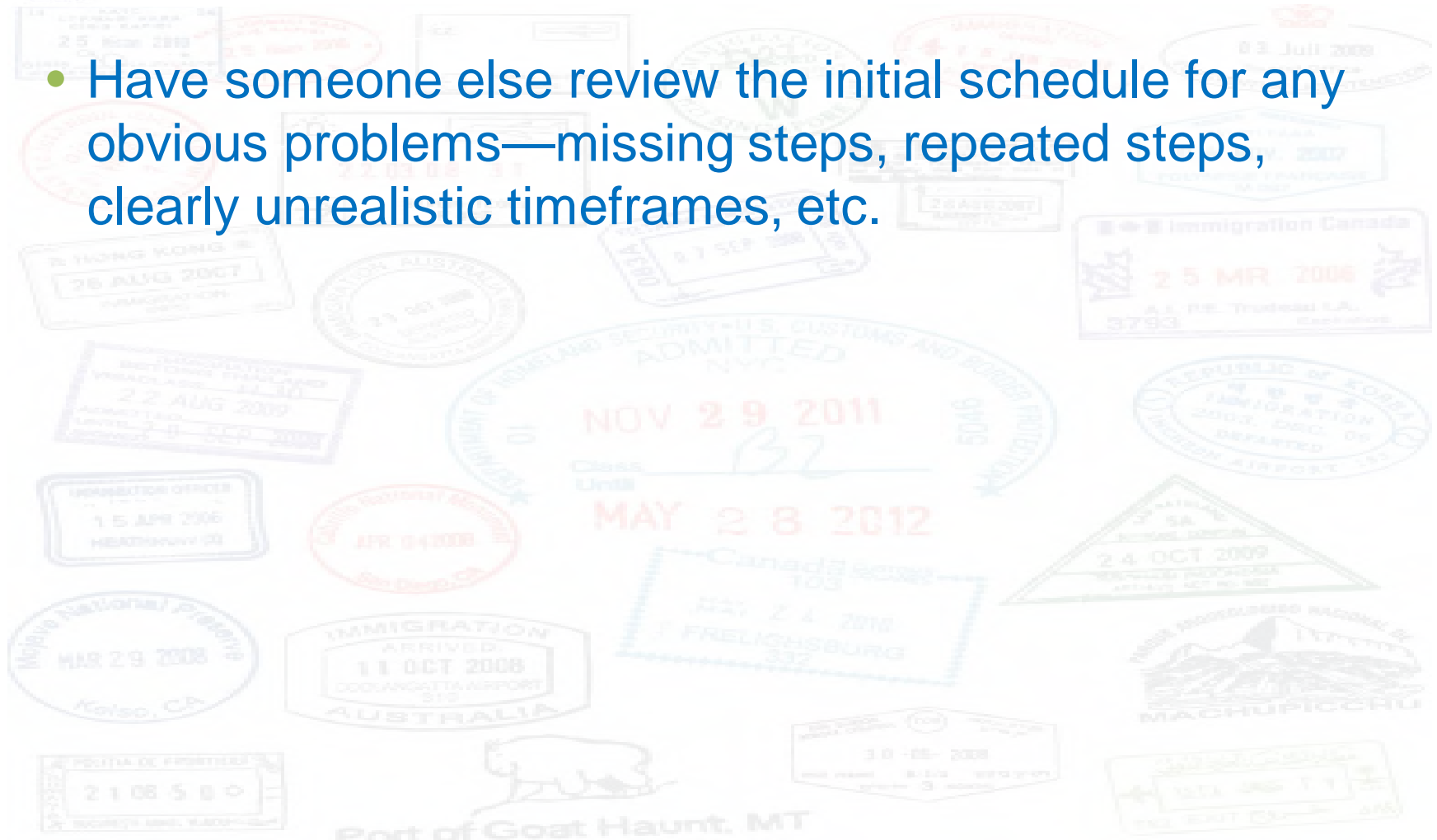






# Step 6: Vet the Initial Schedule

- Have someone else review the initial schedule for any obvious problems—missing steps, repeated steps, clearly unrealistic timeframes, etc.





# Step 6: Vet the Initial Schedule

- Have someone else review the initial schedule for any obvious problems—missing steps, repeated steps, clearly unrealistic timeframes, etc.
- Have key stakeholders review the schedule as well before you disseminate it to the entire team.



## Step 6: Vet the Initial Schedule

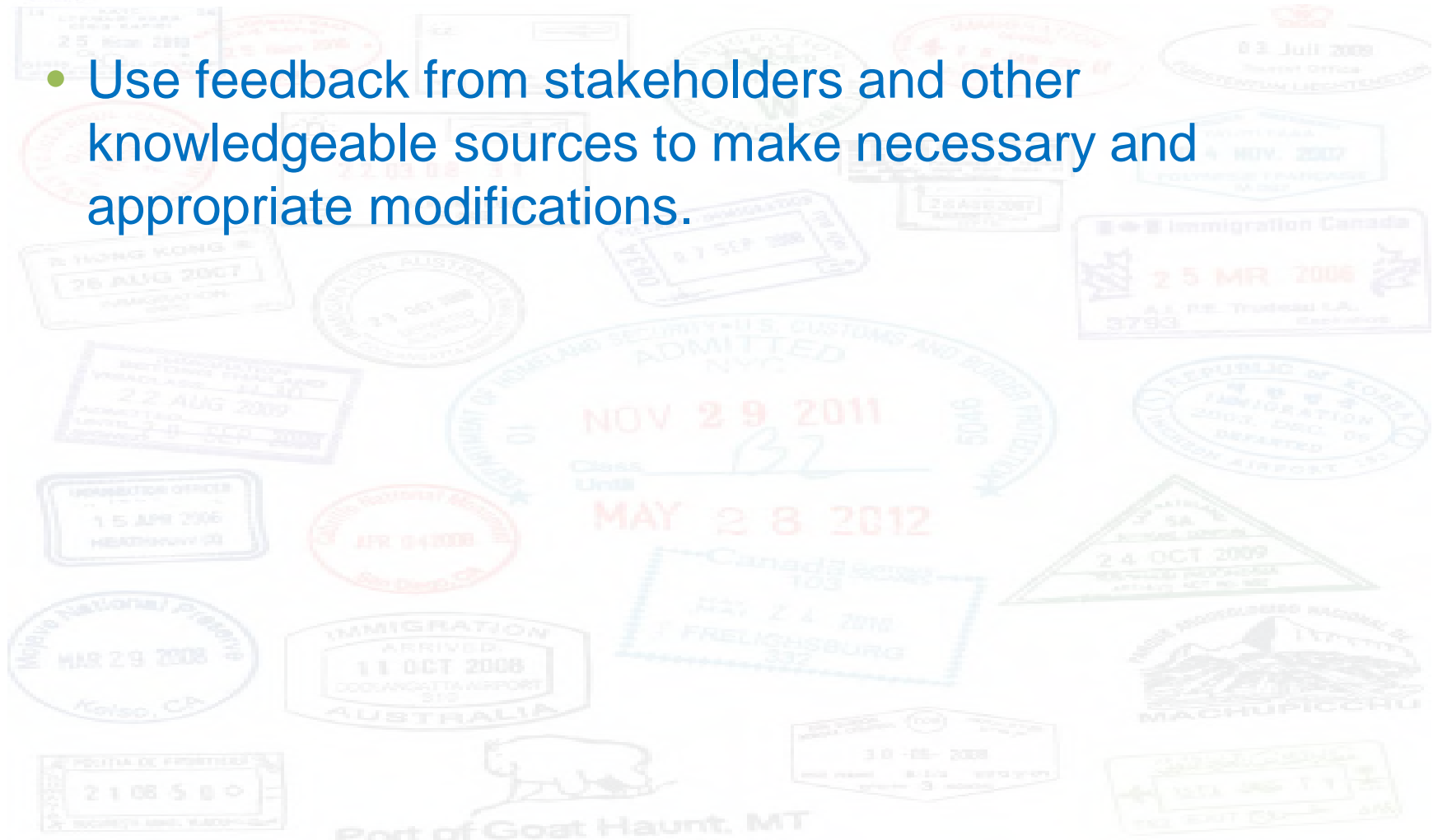
- Have someone else review the initial schedule for any obvious problems—missing steps, repeated steps, clearly unrealistic timeframes, etc.
- Have key stakeholders review the schedule as well before you disseminate it to the entire team.
- Make sure to “overlay” your schedule with other activities going on within your company during the same period, to identify any potential conflicts. Consider holidays, vacations, other projects, client service, etc.





# Step 7: Modify the Schedule

- Use feedback from stakeholders and other knowledgeable sources to make necessary and appropriate modifications.





# Step 7: Modify the Schedule

- Use feedback from stakeholders and other knowledgeable sources to make necessary and appropriate modifications.
- Make necessary adjustments to de-conflict key proposal activities with other activities going on during the same period.



# Step 7: Modify the Schedule

- Use feedback from stakeholders and other knowledgeable sources to make necessary and appropriate modifications.
- Make necessary adjustments to de-conflict key proposal activities with other activities going on during the same period.
- As you make modifications, remember to **WORK TOWARD THE MIDDLE**, just as you did in Step 5.



# Sample Schedule: Calendar View

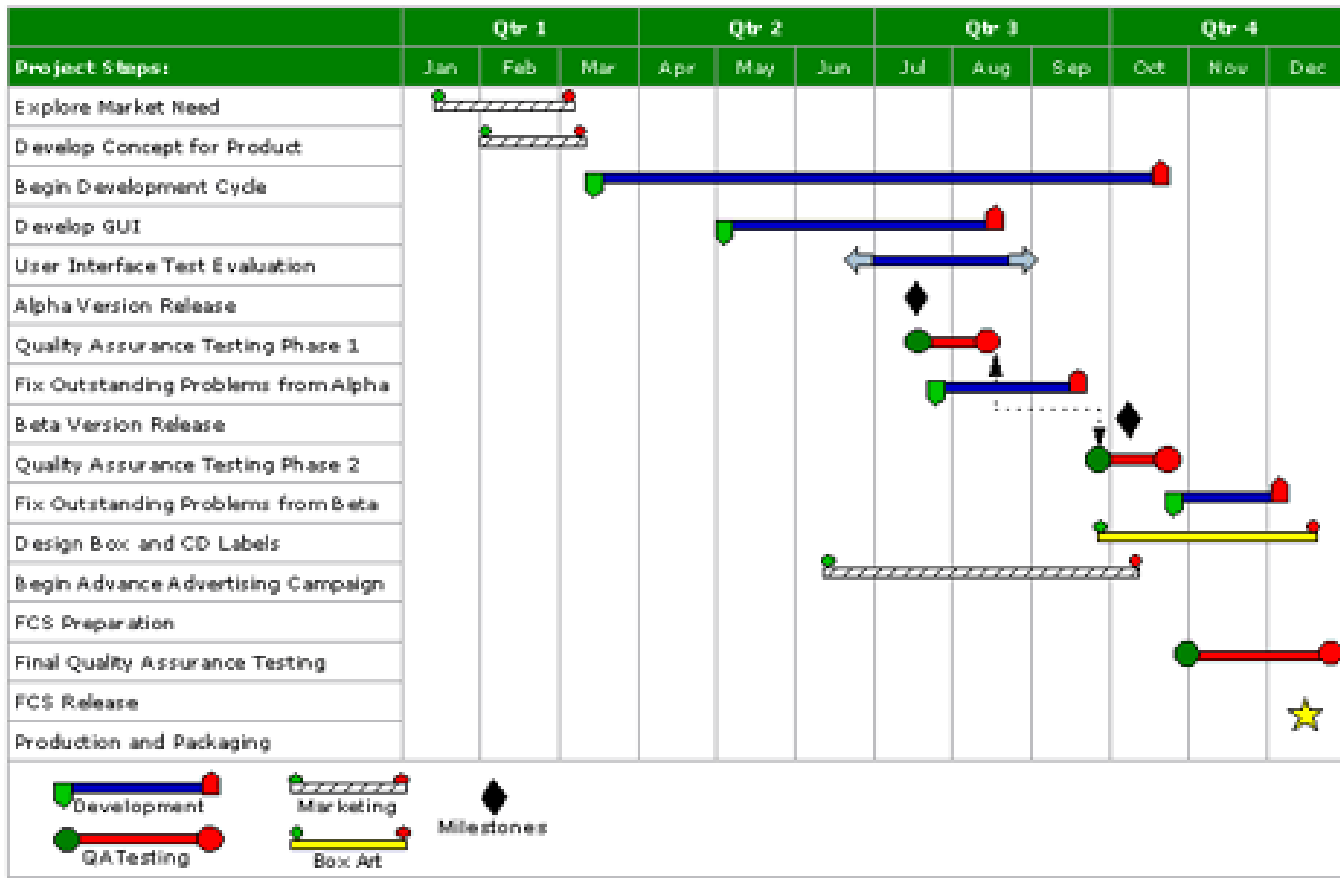
May 2016						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 <b>RFP RELEASED</b> Develop proposal outline Develop proposal schedule	3 GATE REVIEW – BID/NO-BID Begin compliance matrix	4 Review/update proposal strategy, win themes, discriminators Solutioning	5 PROPOSAL KICKOFF Storyboarding	6 Begin writing first draft Review/update pricing strategy; begin pricing development	7
8	9 Writing Begin graphics development <b>Send RFP to subs</b>	10 Writing Graphics development	11 Writing Graphics development <b>PENS DOWN</b> for Pink Team Prep for Pink Team	12 <b>PINK TEAM</b> Pink Team recovery <b>Questions DUE</b> to proposal manager	13 Pink Team revisions Vet questions <b>Submit questions to USG</b>	14
15	16 <b>Questions DUE</b> to USG Pink Team revisions	17 Pink Team revisions <b>Proposals DUE</b> from subs	18 Pink Team revisions	19 <b>PENS DOWN</b> for Red Team Prep for Red Team	20 <b>RED TEAM</b> Red Team recovery	21
22	23 Red Team revisions Graphics revisions	24 Red Team revisions Graphics revisions <b>Finalize pricing</b>	25 <b>GREEN TEAM</b> (final pricing review) <b>PENS DOWN</b> for Gold Team Format/Edit for Gold Team	26 Prep for Gold Team <b>GOLD TEAM</b> (Executive/Management Review)	27 Final Revisions <b>White Glove Review</b> <b>Submit proposal</b> (via e-mail)	28
29	30 <b>MEMORIAL DAY</b>	31 <b>PROPOSAL DUE</b> (via e-mail)				





# Sample Schedule: Gantt View

## Project Development Schedule

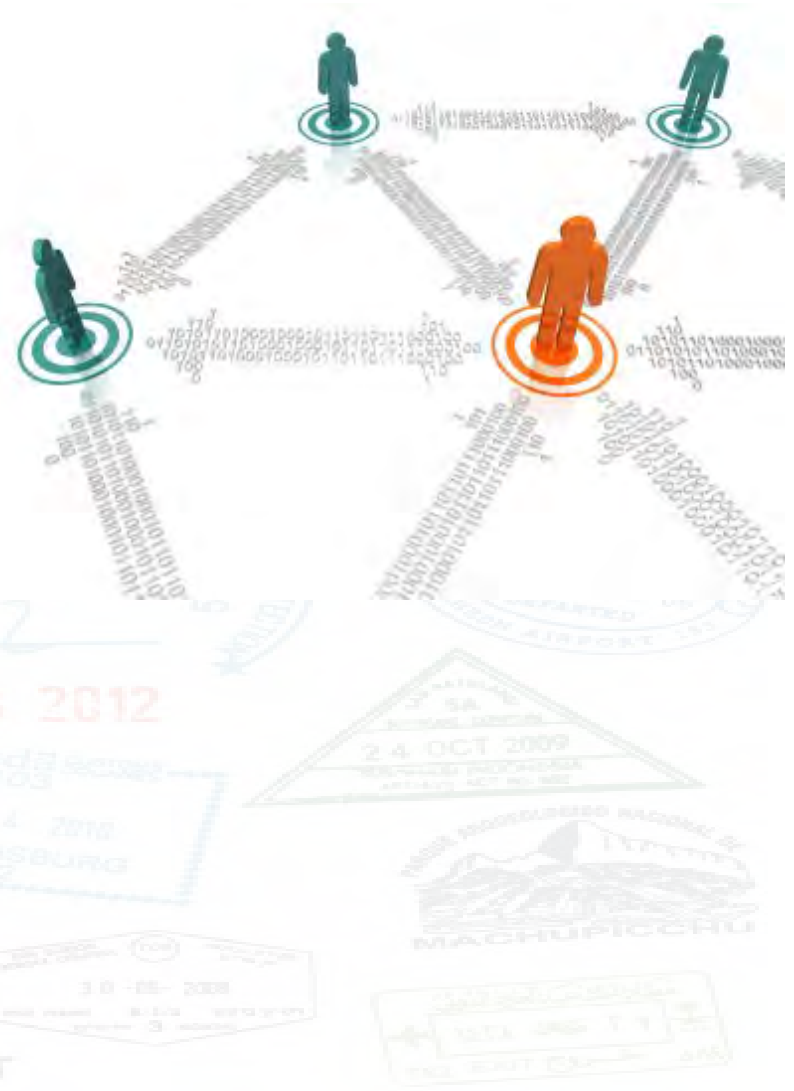






# Now What?

- Disseminate





# Now What?

- Disseminate
- Get Buy-In





# Now What?

- Disseminate
- Get Buy-In
- Monitor





# Now What?

- Disseminate
- Get Buy-In
- Monitor
- Adjust





# Scheduling Tips and Tricks

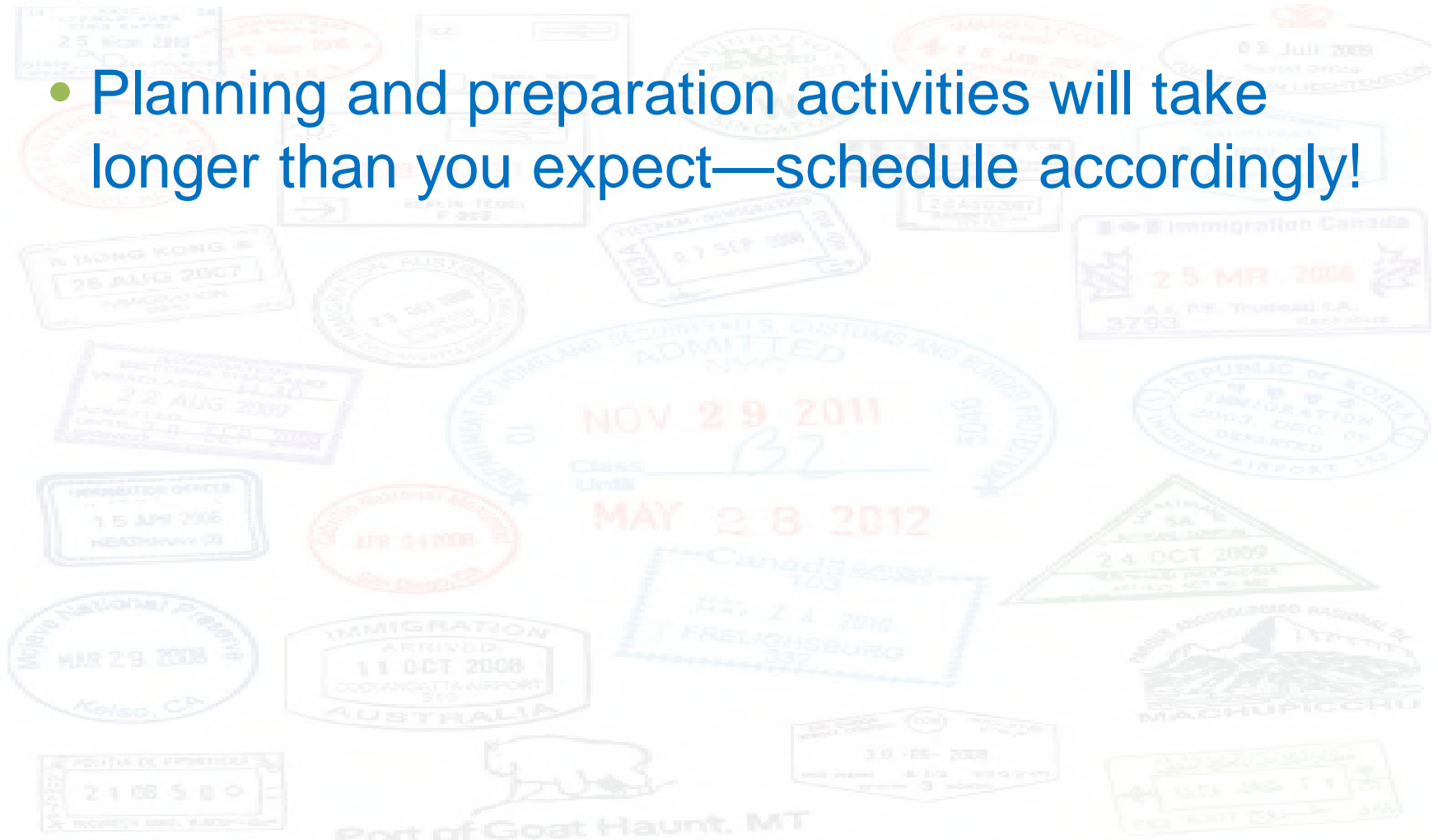


Part of Goat Haunt, MT



# Scheduling Tips and Tricks

- Planning and preparation activities will take longer than you expect—schedule accordingly!







# Scheduling Tips and Tricks

- Planning and preparation activities will take longer than you expect—schedule accordingly!
- Similarly, production activities (including QC) will take longer than you expect—usually much longer.



# Scheduling Tips and Tricks

- Planning and preparation activities will take longer than you expect—schedule accordingly!
- Similarly, production activities (including QC) will take longer than you expect—usually much longer.
- If you need more time for a task, consider allocating more resources.



# Scheduling Tips and Tricks

- Planning and preparation activities will take longer than you expect—schedule accordingly!
- Similarly, production activities (including QC) will take longer than you expect—usually much longer.
- If you need more time for a task, consider allocating more resources.
- Use “time shifts” to your advantage.



# Scheduling Tips and Tricks

- Planning and preparation activities will take longer than you expect—schedule accordingly!
- Similarly, production activities (including QC) will take longer than you expect—usually much longer.
- If you need more time for a task, consider allocating more resources.
- Use “time shifts” to your advantage.
- Use “flex time” for tasks that do not require face-to-face collaboration.



# Questions





# Thank You!

**David M. Stearman**

**Proposal Strategy and Development Consulting LLC**

[www.proposal-strategy-consulting.com](http://www.proposal-strategy-consulting.com)

703-642-2465

[dstearman@proposal-strategy-consulting.com](mailto:dstearman@proposal-strategy-consulting.com)

<https://www.linkedin.com/in/davidmstearman/>