



How to Play Fair in the Magician's Hat: A Case Study

Lessons Learned from both sides

Presenters:

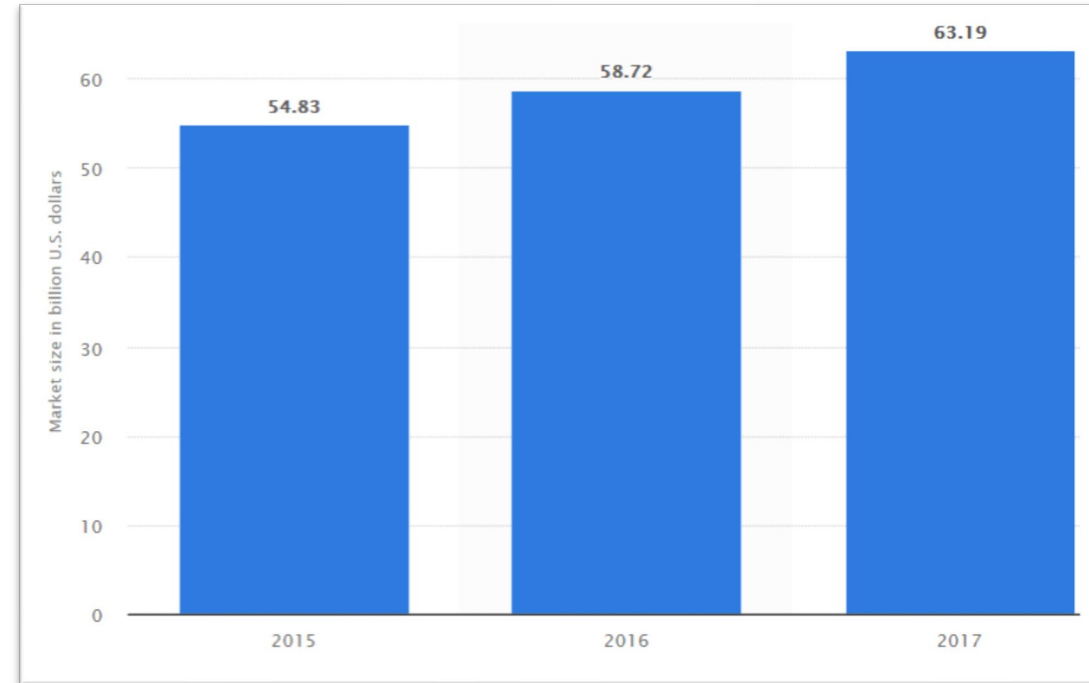
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Did you know...

- In 2017, the consulting market value in the United States was approximately \$63.2B.
- There were approximately **659,200** management consultants employed in the United States as of May 2017.



Objectives

At the end of this presentation, you will be able to:

- Work effectively with third party consultants and teaming partners
- Identify how to obtain best return on investment from your consultants
- Understand how to intentionally leverage knowledge and skills from your consultants
- Become a valuable contributor to your client's proposal development team





The Project – Setting the Stage for a Win

- Year: 2013
- Opportunity: Department of Army, Indefinite Delivery Indefinite Quantity (IDIQ) solicitation
- Service: Logistics
- Three teaming partners: Allied Technologies Consultants (ATC), DLH, MacAulay Brown (MacB)
- Prime: ATC (located in Fredericks, Maryland)
- Project location: DLH (Atlanta)
- Project duration: Six weeks

The Project – Setting the Stage for a Win

- Proposal Manager for ATC (prime): Keera Godfrey, consultant
- Proposal Manager for DLH- (major teaming partner): Shakita Briggs



Actual picture of the War Room

How this presentation is organized

- Case study organized using the 4 project management phases—initiate, plan, execute and closure
- Provide overview of events that occurred in each phase
- Provide individual lesson learned





Initiation Phase



Initiation

- Resources
 - **People, process, tools, materials, space, and equipment**
- Partners
 - **Expertise, collaborations, communications and gap analysis**
- Solution
 - **Big picture, detailed approach, and right or wrong**
- Workshare
 - **Unique approach to level of support from teaming partners**
- Expectations

Initiation – Lesson Learned (for client)

- View consultants as partners
- Equip consultants with tools needed to be successful
- Designate workspace, supplies, and resources
- Identify a champion to support the consultant
- Create a orientation guide for consultants
- Access to online collaboration software



Initiation – Lesson Learned (for consultants)

- Leave ego at the door
- Take note of what is and is not provided. Adjust accordingly
- Understand all the players and their expectations
- Show up ready to work on Day One
- Follow the orientation guide





Planning Phase

Planning

- Read the solicitation
- Plan kickoff meeting – develop presentation
- Create proposal management documents
 - **Schedule, Outline, Compliance Matrix, Writing Templates**
- Develop the messaging strategy
- Allocation of resources
 - **Data calls, writing assignments**



Planning – Lesson Learned (for client)

- Be willing to accept “another way”. There is more than one way to skin a cat
- Articulate expectations and preferences upfront
- Define the solution. Set the stage right



Planning – Lesson Learned (for consultants)

- Develop your own process and templates
- Be willing to accept “another way”
- Define how YOU work
- Ask questions to probe and foster innovation
- Help client brainstorm/refine solutions





Execution Phase

Execution

- Brainstorming
 - **Solutioning sessions at the board**
- Walking the wall
 - **Looking at the big picture**
- Color reviews
 - **Extensive recovery, administrative burden, live vs. virtual**
- “Putting icing on the cake”
 - **Allowing time to sell the proof**
- Production
 - **More than a last minute action, make the time**



Execution – Lesson Learned (for client)

- Consultants do not have all the answers, be willing to facilitate brainstorming sessions
- Consistently going back to the board (it became the guiding force to help tell the story)
- Value adds – if a process is outdated stop holding on to it and find a way to sell the more efficient process to the government
- Step outside the process to see the content



Execution – Lesson Learned (for consultants)

- Think like an owner
- Be a trusted advisor
- Focus and follow the plan
- Brainstorm with the client
- Understand the current situation and solutions – ask right questions to SMEs
- Work the client’s schedule
- Ask for what you need and be a team player
- Be “easy to work with”





Closure Phase

Closure

- Provide confirmation/proof of submission
- Close collaborative workspace
- Discuss lessons learned



Closure – Lesson Learned (for client)

- Provide clear instructions for documentation and reporting
- Pay invoices on time (explain frequency)
- Review the process with your consultant
 - **Was it efficient or cumbersome?**
- Thank the consultant for augmenting your team



Closure – Lesson Learned (for consultants)

- Transfer all files to client
- Return all print materials to client to discard
- Provide a debrief, if requested
- Ask for a favorable reference
- Submit detailed invoices - describe work performed
- Update/refine your processes and templates as needed
- Celebrate...even if by yourself!





Summary



Final thoughts for both sides

1. Consultants augment, rather than replace the internal proposal team
2. Understand your value to the process and the organization
3. Respect each others' skills and tools
4. When conflict occurs, always look for common ground
5. Bring your whole self to work, but do not leave it there
6. Be mindful of overload and burnout
7. Manage expectations. Do what you do and do it well!
8. **HAVE FUN!**



Questions?



Thank you!

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