

What is A Proposal Coordinator And What Planet Do They Live On?

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Introductions

- Athena Perez, AM.APMP
 - 3 years of experience
 - Industries: Civil Engineering, Federal Healthcare
- Stevie McElfresh, AM.APMP
 - 4 years of experience
 - Industries: Architecture/Engineering/Construction, Healthcare

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Agenda

- The Setting
 - What's this about a survey?
- The Players
 - An overview of the respondents
- The Results
 - A summary and discussion of key findings

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The Setting

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Why Proposal Coordinators?

- Often an ambiguous title in the proposal development world
- Most presentations focus on Proposal Managers

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Why Proposal Coordinators?

- Two surveys
 - One for Proposal Coordinators, one for non-Proposal Coordinators
 - 30 Proposal Coordinator Respondents
 - 39 non-Proposal Coordinator Respondents

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The Players

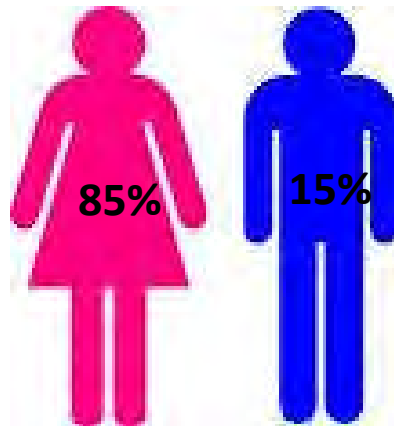
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Federal



Healthcare



Average age of respondents: 39-45
Work either alone or on teams of 4 or more



A/E/C



IT

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The Results

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Category 1 – The Mislabeled Proposal Manager

- The successful candidate will be responsible for the **preparation of dynamic, compliant, and high-quality proposals, statement of qualifications, and presentations in the pursuit of municipal, Federal and private engineering and consulting projects.**
- Additionally, the successful candidate will be expected to:
 - Work with various staff members to collect, **edit and strategically write resumes, project descriptions, firm profiles** and other proposal material
 - Manage the **proposal development schedule** to ensure timely and compliant submissions
 - Coordinate the **development of graphics** and other items required to properly convey the approach and themes needed to sell the proposal
 - **Produce the final submittal documents** (i.e., proposal, SOQ, presentation, etc.)
 - **Organize proposal, SOQ, presentation and other marketing material** in the Company's databases
 - Work with project managers, marketing management, and office staff to support day-to-day sales/business development efforts.

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The mislabeled Proposal Manager

They do it all!



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Category 2 – The Proposal Team Gopher

- Candidate is part of the proposal process, the Request For Proposal (RFP) process as well as business administration responsibilities and other related duties as assigned.

Desired Skills & Experience

- Qualified candidates will have a bachelors degree or two years of previous experience. Candidates will also have excellent communication skills, be detail oriented and have strong organizational skills. Candidates should have strong working knowledge of MS Word, MS Excel, MS PowerPoint and MS Access. Project management, contact database management, and Desktop Publishing software skills desirable.

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The Proposal Team Gopher:

Able to keep track of everything on a single schedule!



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Category 3 – The Person who does the stuff no one else wants to do

Responsible for the day-to-day proposal process to include status updates, meeting arrangements, schedules, recording assignments, library support and facility/equipment availability.

Primary duties include but are not limited to: Coordinate production of the final proposal. Manage the proposal repository, including obtaining materials, posting documents, providing access, etc.

Review and provide critical analysis of written drafts for compliance with all customer RFP/RFQ requirements, and analyze how well a draft follows an outline, communicates themes, and conveys a message.

Advise proposal writers and team in matters of writing style, naming conventions, syntax, references and terminology used in proposal documents and briefings to improve the general quality and effectiveness of communications.

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**The person
who does
the stuff no
one else
wants to do!**



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Current Responsibilities

Tracking deadlines

Developing the proposal schedule

Production

Editing sections

Setting proposal meetings

Gathering signatures

Setting up for proposal meetings

Writing sections

Graphics

Desktop Publishing

Facilitating meetings

Color team reviewer

Note taker

Drafting outlines

Shredding RFPs and related documents

Maintaining/updating the contact list

Setting up storyboards

Identifying and vetting the opportunities to pursue

Submitting via hard copy, e-mail or online through proposal management systems

Tracking projects and positioning efforts prior to RFP release

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Wanted Responsibilities

Setting proposal meetings

Setting up for proposal meetings

Developing the proposal schedule

Gathering signatures

Production

Writing sections

Editing sections

Graphics

Desktop Publishing

Tracking deadlines

Facilitating meetings

Color team reviewer

Drafting Outlines

Shredding RFPs and related documents

Setting up storyboards

Maintaining/updating the contact list

Note taker

Process improvement initiatives

Training staff on how to become better writers and leaders

Interview Strategy

Research & Business Development

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Opportunity Identification and Assessment Phase

- Building folders for capture strategy, strengths and weaknesses analysis, and competition analysis
- Assisting in producing presentation materials

Proposal Development Phase

Scheduling the proposal effort

- Coordinating the kickoff meetings
- Facilitating draft control and draft review
- Coordinating storyboarding and writing efforts
- Furnishing standard write-ups and resumes from the proposal center database

Proposal Production Phase

Coordinate the final integration of art and text

- Organize and supervise the final edit cycle
- Coordinate the delivery of the proposal to the customer



*Graphic from the 2008 APMP Salary Survey.



Challenges, Complaints & Desires

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Challenges

Schedule

- Because I often rely on my internal clients for proposal content, sometimes my schedule isn't my own

Deadlines

- It was getting busy staff to meet internal deadlines for proposals

Time & Resources

- High-stress job; always juggling multiple projects at the same time; time constraints

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Complaints

Pace

- Working too many hours to keep up with turning out proposals every 2 weeks
- Quick turn-around, expectations to complete proposal processes on extremely limited schedule

Respect

- We are seen as the part of the process that is the most disposable in a time crunch
- Lack of respect from leadership and the amount of hours I put in during a proposal effort
- Lack of respect for my time

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Desires

Support

- Support to back me up when I have to push back on people to get their deliverables in
- Clear direction
- Attention, validation, common ground

Guidance

- Mentorship and clear direction are the two things I need most from leadership
- The ability to be a bit more empowered and not micromanaged so much
- Consideration for new challenges and learning experiences when choosing my assignments






Decision Making

- Firm, timely decisions related to pricing
- More critical assessment of when to pursue an opportunity and when to pass
- Strong and disciplined “go/no go” decisions

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Career Opportunities & Satisfaction

	Work/Life Balance	Opportunities for Growth and Achievement	Being Viewed as an Equal
	10%	26.7%	23.3%
	36.7%	23.3%	36.7%
	20%	3.3%	3.3%
	30%	36.7%	20%
	3.3%	10%	16.7%

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Amazing Feats and Acts of Courage

“Drive through a major blizzard at 5:00 a.m. to get a job submitted.”



To remain in this position for as long as I have, and still somehow enjoy what I do.

“Complete a large proposal in less than 3 business days - 21 hour days required.”

“Work three days in a row, with only three cat-naps to keep me sane.”

“Several times I have worked through the night and have set off the office alarm. Try explaining to the cops twice in one night that you're really working at 3 a.m. and not committing burglary.”

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Words of Wisdom

“Take charge right away, pay attention to detail, don’t rely on boilerplate. You are valued whether you hear it or not.”

“For those that are new, it will come with experience. Don't be afraid to hound and hover if needed.”

“If you want to do more, ASK! Don't expect everyone else to know your aspirations.”

“Be organized and proactive. 100% of the Proposals, on time, 100% of the time, at the highest possible quality!”

“Learn and anticipate the needs of your proposal team and be responsive. Maintain a sense of urgency in your work and your trust and integrity will be noticed.”

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Summary

- Proposal Coordinators are a varied and diverse group of people encompassing a wide range of industries
- Good proposal coordinators can come from any industry and be any person
- Good proposal coordinators are adaptable
- Good proposal coordinators ask questions!
- No matter the industry or the person, have a defined role

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Actions

- Reach out to Management for guidance
- Talk with people outside of your company (like at the APMP conferences!)
- Volunteer for new responsibilities
- Work with your manager to revise your job description

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Questions?

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