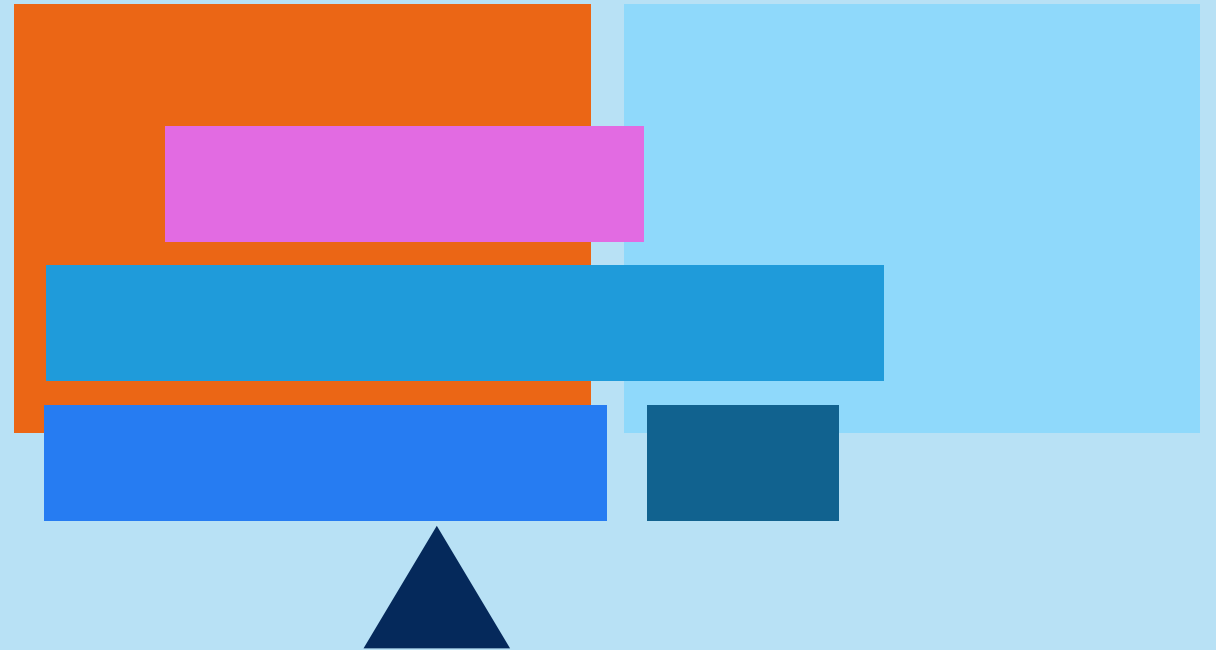




Stack the Odds in Your Favor: Craft Your Proposal to Obtain the Winning Score

Brenda Crist – Lohfeld Consulting Group





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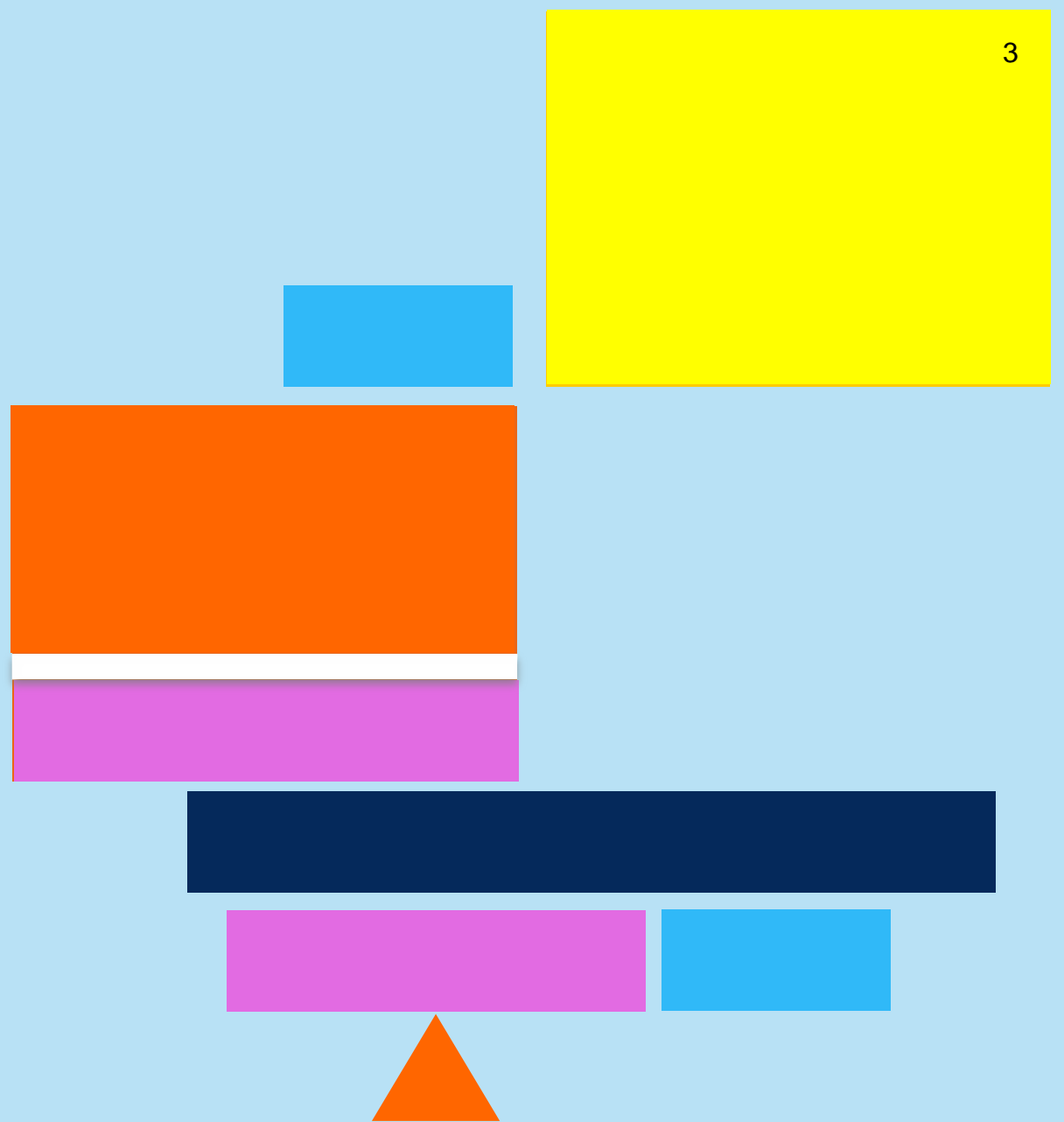


18th Southern Proposal Accents Conference

October 24, 2014
Atlanta, GA

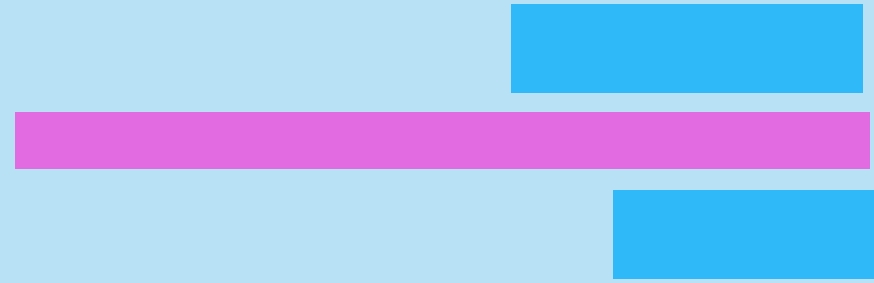


Winners and Losers





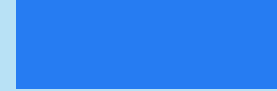
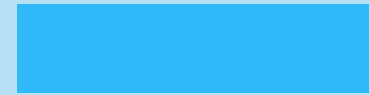
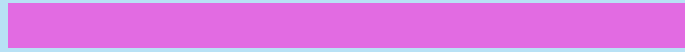
The Losers



- Produce a Non-Compliant Proposal and are Kicked-Out
- Don't Make the Competitive Range because they were:
 - Non-Responsive to the Requirements
 - Price was Too High
 - Underestimated the Competition



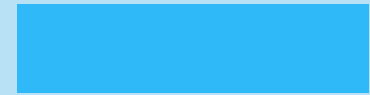
The Losers



- Had Fewer Strengths and More Weaknesses because they:
 - Did Not Develop their Strengths
 - Did Not Substantiate their Strengths
 - Did Not Verify their Strengths Trumped those of the Competitors
- Did Not Understand the Customer's Best Value or Lowest Price Requirement



The Winners



- Produce a Compliant and Responsive Proposal
- Are Able to Break through the Competitive Range
- Correctly Respond to Customers Clarifications
- Have the Most Strengths and Fewest Weaknesses
- Offer the Best Value or Lowest Price

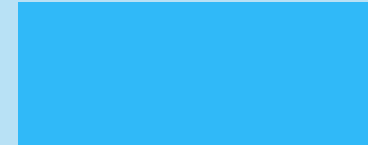




The Winners



- Produce a Proposal that is:
 - Customer-Focused
 - Compelling and Feature Rich
 - Easy to Evaluate
 - Visually Appealing
 - Well-Written
- Pass the Trade Off Analysis





Rule # 1: Keep Score



+ Create a Score Sheet

- Create a Score Sheet to Guide Your Capture
 - Create it Based on the Previous Solicitation
 - Add What You Know About the Current Solicitation
 - Add Your Customer's Requirements
 - Update the Score Sheet as the Capture Develops



Sample Score Sheet

			US			Competitor 1		
RFP Section No#	Section Name	Total Points	Strengths	Weaknesses	Score	Strengths	Weaknesses	Score
M.1	Technical Section							
M.1.1	Help Desk	25	4	25	25	4	1	20
M.1.2	Technical Writing	25	4	1	20	4	0	25
M.2	Management	25	10	1	19	10	2	17
M.3	Past Performance	25	4	0	25	3	1	20
	Total	100			89			82



Understand What Defines a Strength



A Strength:

- Contributes to Successful Mission and Project Outcome
- Exceeds Customer Requirements and Offers More Benefit
- Minimizes Project Risk
- Offers a Good Return on Investment or Value

A Strength is Measured by:

- Cost Savings
- Lower Maintenance Costs
- Increased Productivity
- Streamlined Workflow
- Increased Quality
- Lower Risk

+ Understand the Importance of Trade Offs

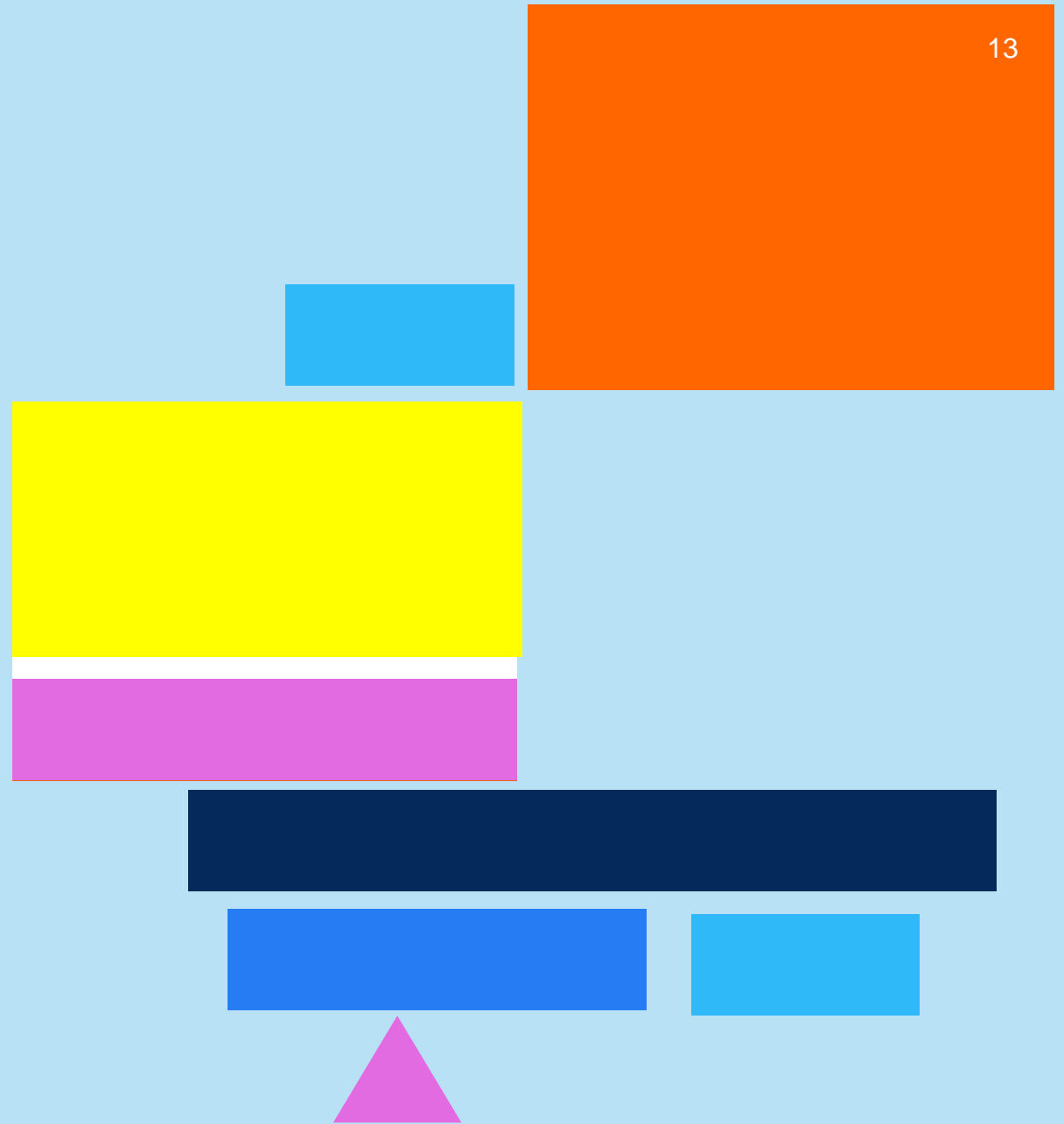


- NASA ranked the Mission Suitability factor as more important than the Management and Past Performance factors combined. NASA ranked the Cost/Price factor as less important than the other factors combined
- Company C and D both had five strengths and one weakness
- Company C had 4 Mission Suitability Strengths and 1 Management Strength
- Company D had 3 Mission Suitability Strengths and 2 Management Strengths
- The costs were equal

Lesson Learned:

- Understand how the evaluation criteria is ranked, if not ask questions
- Understand the customer's priorities in evaluating the proposal
- Understand what is important to the customer and what capabilities the customer will not trade
- Clearly present your solution, provide substantiating evidence, and mitigate weaknesses
- Understand the strengths and weaknesses of your competitors and how to ghost them as needed

Rule #2 – Best Informed Wins!



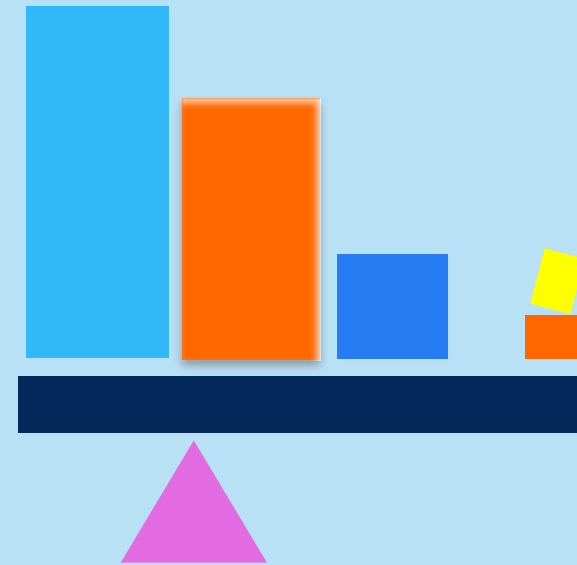


A High Scoring Proposal Depends on Great Intelligence



Collect Information About:

- Customers and Stakeholders
- Competitors
- Potential Partners
- Potential Key Personnel
- Your Company



+ Track Your Score Using a Capture Spreadsheet

Create Columns to Capture:

- Draft SOW Requirements
- What Outcome does the Customer Expect to Achieve?
- What Would they Give Someone a ""BLUE"" Rating?"
- What the CUSTOMER thinks is RISKY about this aspect of program
- What are our STRENGTHS?



Create a Capture Spreadsheet Cont'd

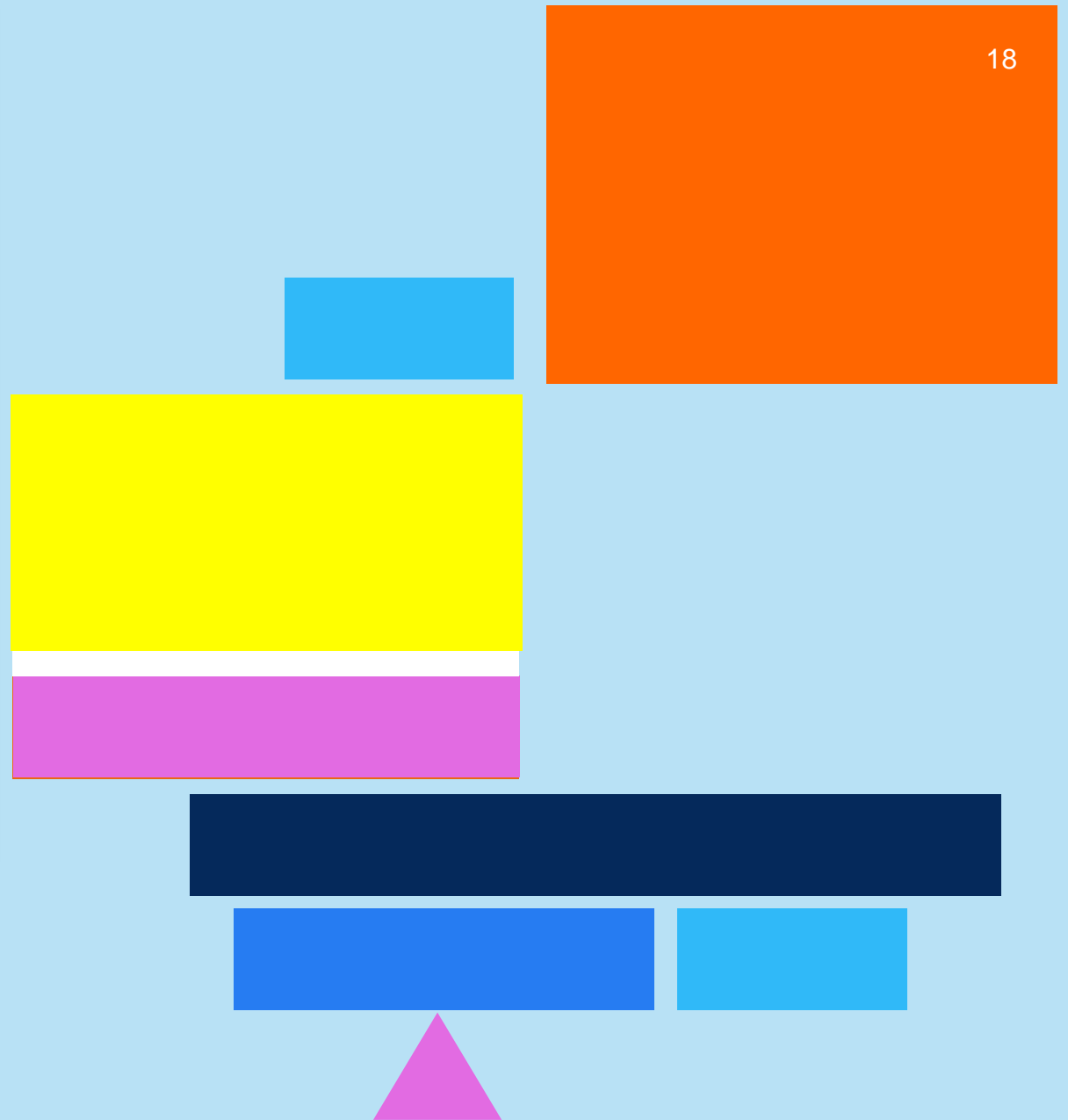
- What Are Our WEAKNESSES?
- What Will We Do to Overcome Our WEAKNESSES?
- "What Competitor STRENGTHS Do We Need to COUNTER?"
- "What Competitor WEAKNESSES Do We Need to GHOST?"
- What Is Your Approach?
- How Will the Customer Rate Our Solution/Approach Against the Competition?



Marshall Your Forces to Collect Information

- Train Personnel in Ethical Information Collection
- Define Roles and Responsibilities for Information Collection
 - Capture Manager Collects Strategic Information
 - Proposal Manager Collects Acquisition History and Internal Corporate Information, and Manages the Information
 - One-Site Personnel Collect Information about the Customer, Competitors, and Potential Partners, and Personnel
- Human Resources Collects Information About Potential Key Personnel

Rule #3
You Must Know
the Customer
and the Customer
Must Value You



Understand What the Customer Wants

- You Typically Have 30 Minutes to 1 Hour with a Customer
- Send Information About Your Company Ahead to Maximize Your Time Spent Discussing the Customer's Requirements
- Bring Tailored Questions to Maximize Your Time
- Try to Hit Every Area of the Evaluation Criteria
- Let the Customer Do the Talking
- Immediately Document Interview Results

Sample Questions




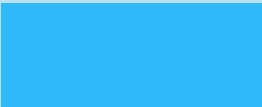


- Past Performance - What are the Capabilities Are You Looking For In a Company to Support the Project?
- Technical – What Are Your Objectives for the Project?
- Management - What Management Style Do You Prefer?



Sample Questions



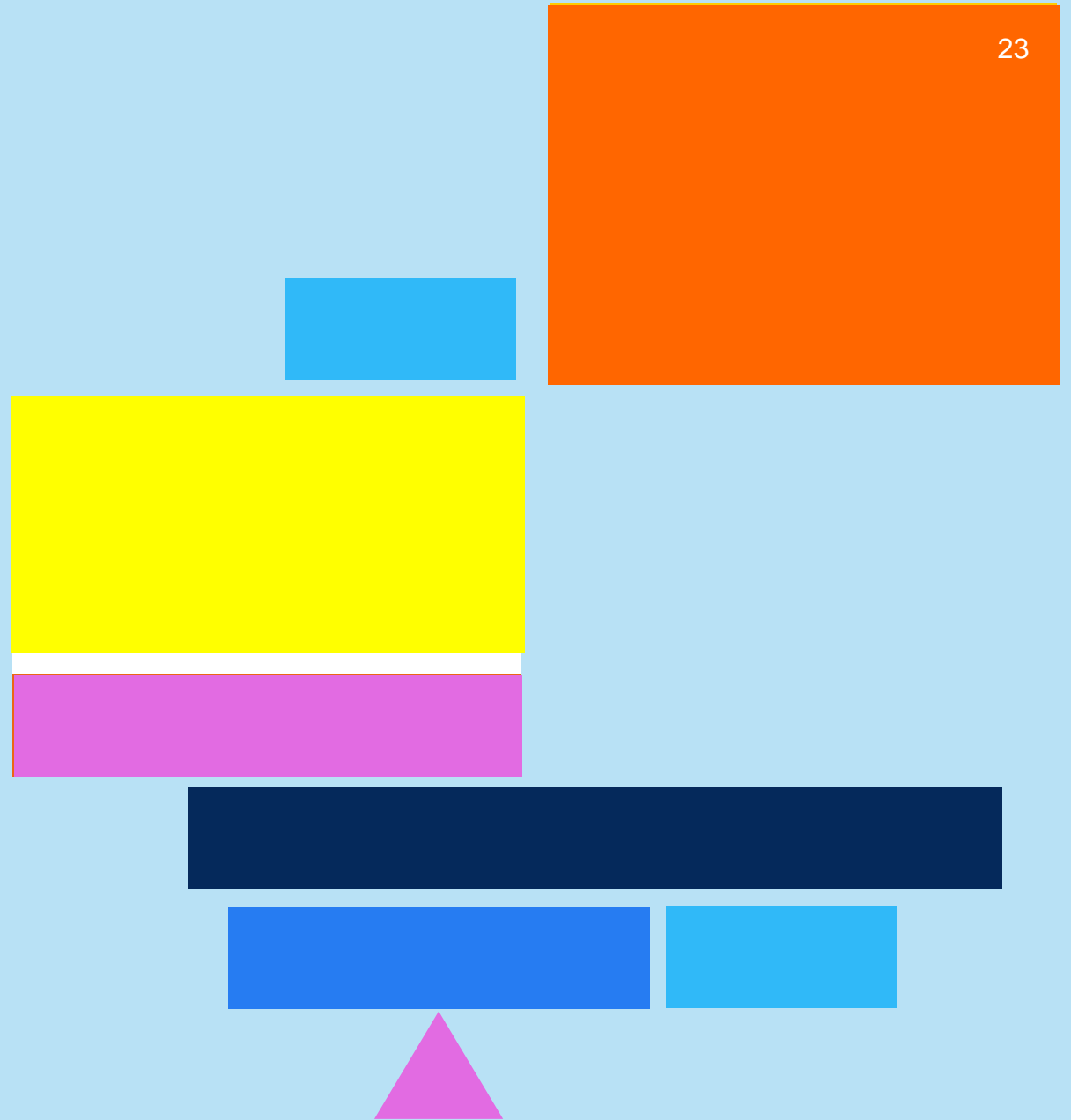
- Key Personnel – What Qualifications are You Looking for in a Project Manager and Technical Personnel?
 - Price – What Is Your Budget Tolerance, What Factors Informed Your Independent Cost Estimate?
 - Risks – What Risks or Constraints Will Impact Project Operations?
- 
- 
- 
- 

The Customer Must Value You

- Show Your Leadership in the Among the Competitors
 - Produce White Papers
 - Present a Industry Events
 - Provide Reach Back Support
- Demonstrate Your Ability to Proactively Manage Operations
- Work to Increase the Love Factor



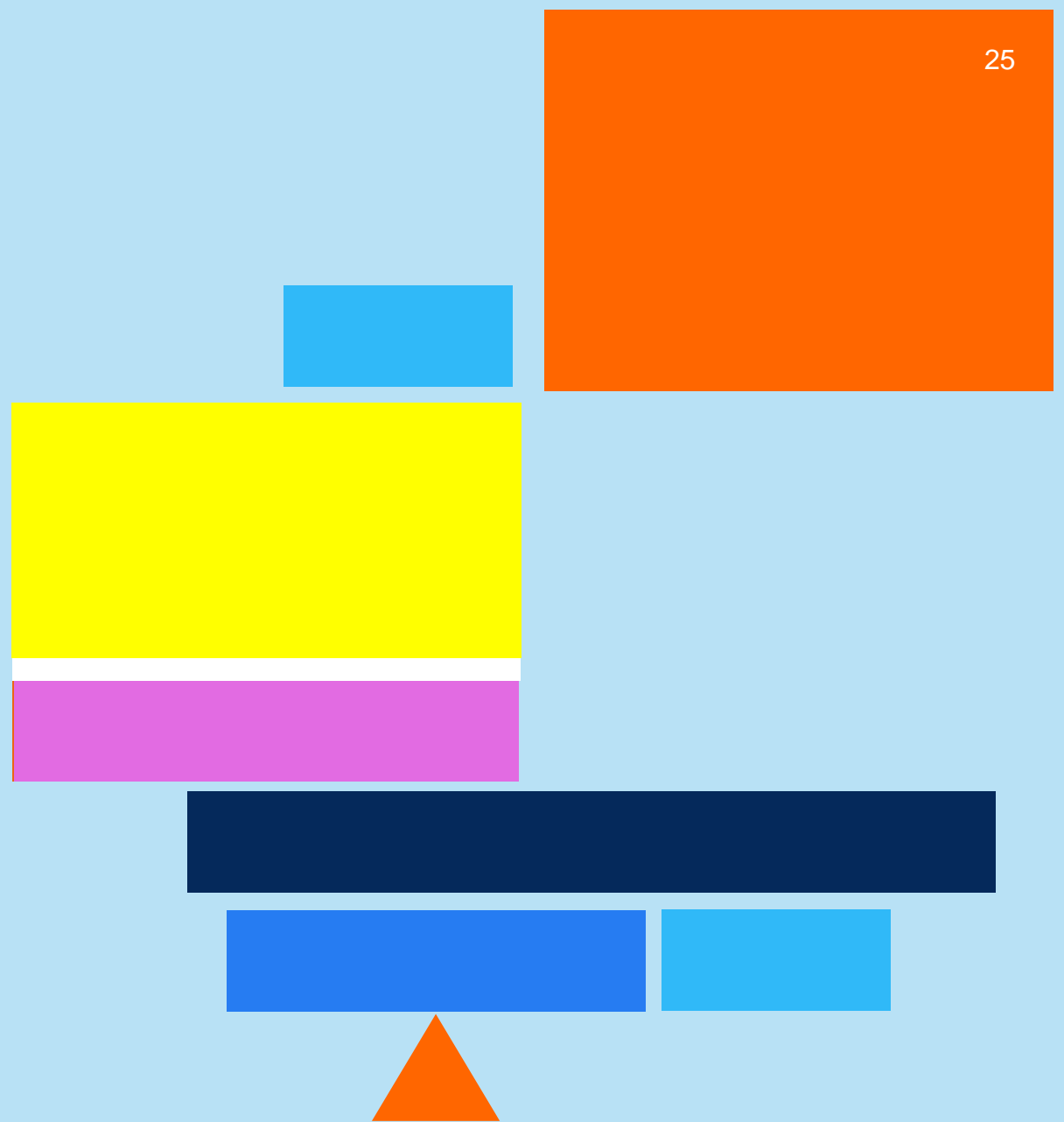
Rule # 4: Validate Your Solution with the Customer



+ Validate Your Solution with the Customer

- Present Your Solution to the Customer for Feedback
- Use the Customer's Feedback to Re-score Your Draft Solution and Re-Validate it as Needed
- Justify the Score by Identifying the Number of Solution Strengths and Weaknesses
- Identify What Trade Offs Might Occur

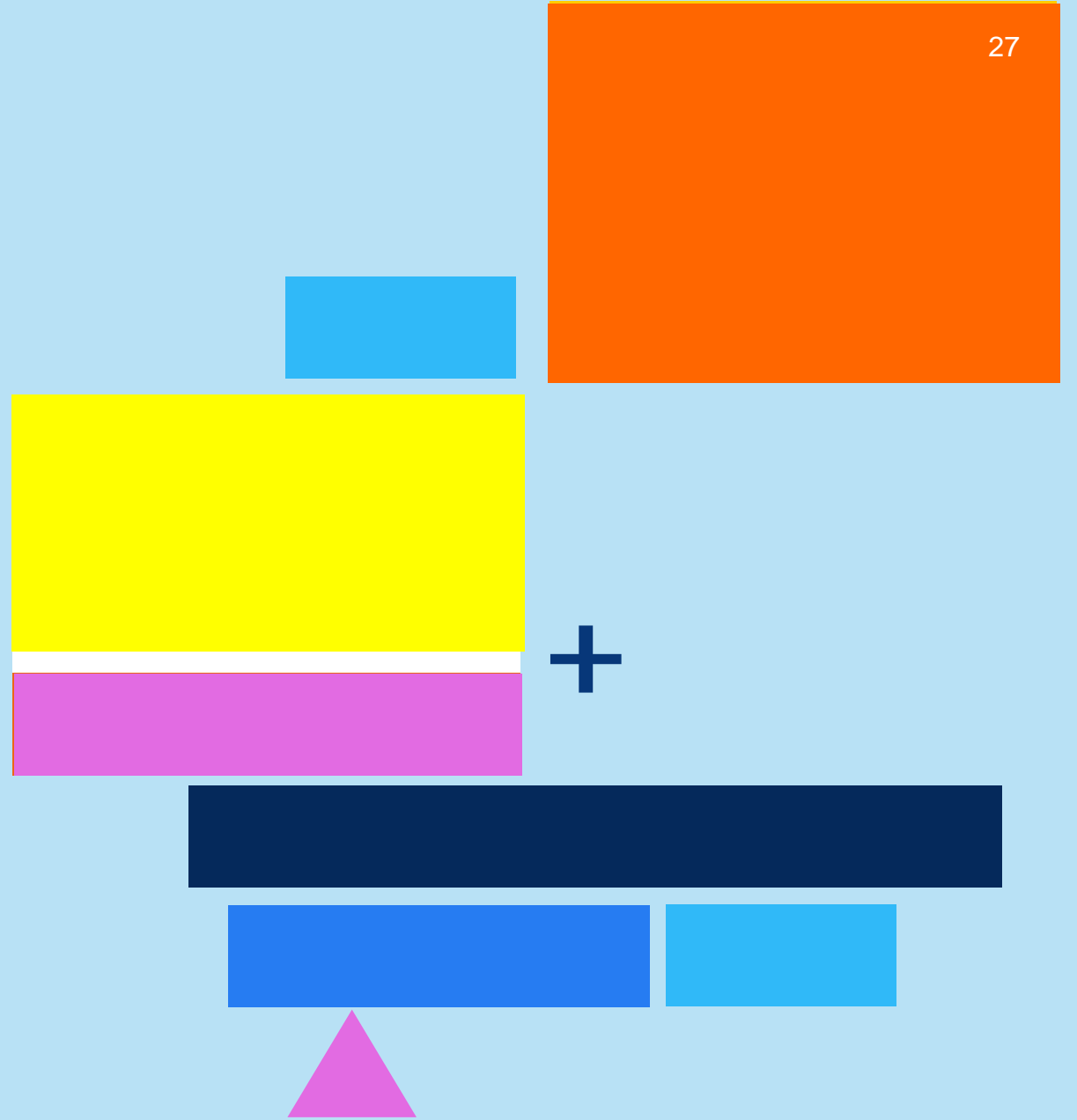
#5 Save Lessons Learned



+ Save Lessons Learned

- Conduct Lessons Learned
 - Save the Debriefs
 - Use them to Increase Your Score in the Future
-
-

Win Lab





Lab 1: What Questions Would You Ask?





Lab 1: Ask the Customer the Right Questions

Scenario

- **Agency:** The Health Resources and Services Administration (HRSA) helps provide access to health care for people who are geographically isolated or medically vulnerable in every state and U.S. territory. The agency is composed of six bureau's each with a different missions.
-
- 
- 

Lab 1: Ask the Customer the Right Questions

- **Objective:** The purpose of the new contract is to provide the following services in 2015:
 - Conference planning services
 - Develop meeting materials
 - Manage conference logistics
 - Manage conference communications



Lab 1: Ask the Customer the Right Questions

cont'd

Scenario

Examples of meetings include

- All Grantee Meeting—minimum 500 person conference which examines cross-cutting issues affecting HRSA's programs as it relates to a particular bureau and/or office
- Clinical Conference—intensive 400 person 2.5 day conference, which provides a comprehensive and timely overview of treatment issues including HIV/AIDs, low birth weight, and dementia



+ Lab 1: Ask the Customer the Right Questions

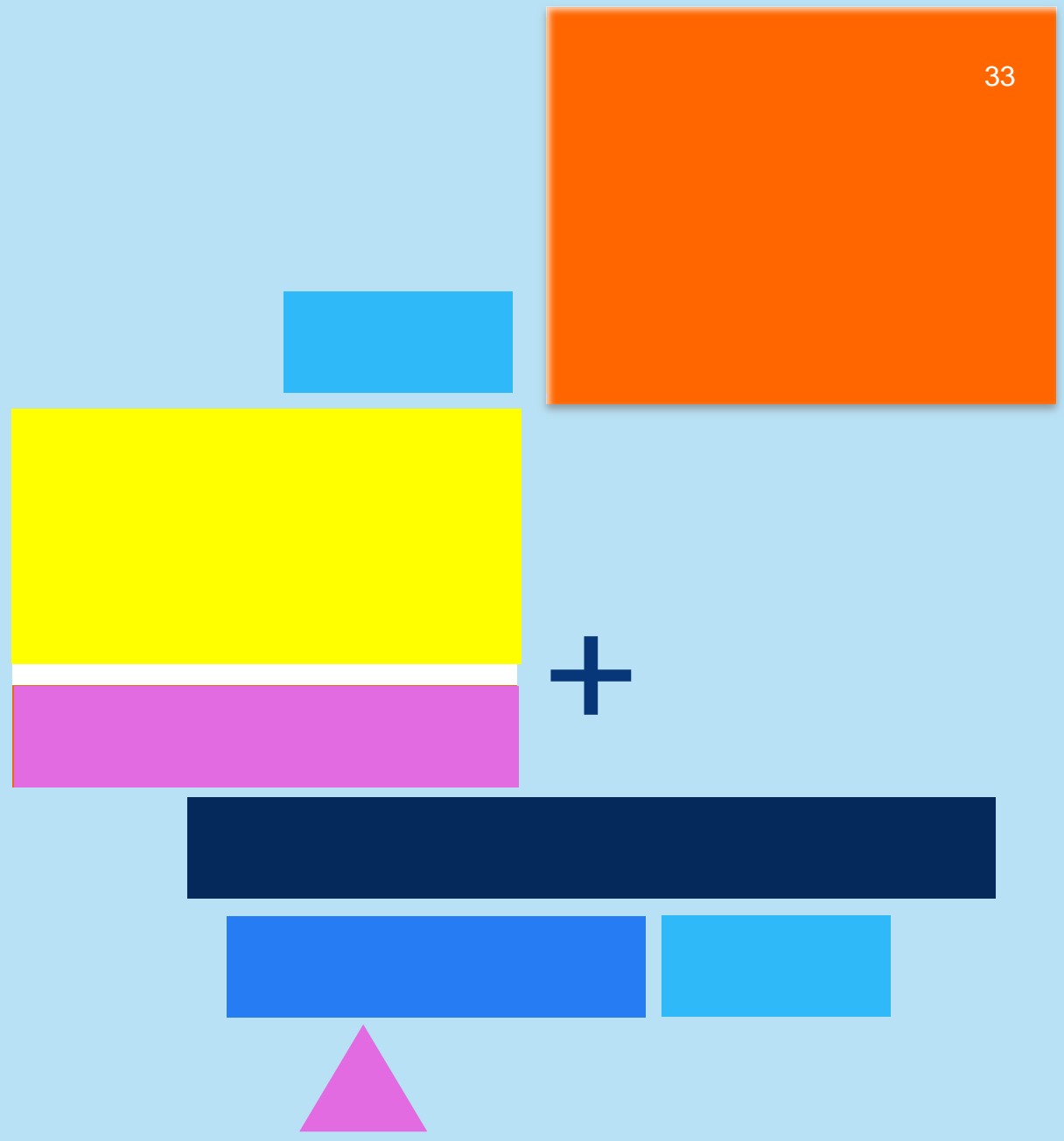
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Scenario

Examples of meetings include

- Technical Assistance—provides training, continuing education units (CEUs) etc. to grantees and/or constituents
 - Your Mission: you have been given a 30 minute meeting with the HRSA COR, you have 3 minutes to come up with 5 questions to ask the COR
-

Win Lab 2 : Create and Test Your Strengths



+ Create and Test a Strength

1. Form groups
 2. Create a strength to support the HRSA proposal
 3. In 3 minutes exchange papers with your neighboring group
 4. Score their strength; assign 1 point for each of the 12 strength tests they passed
 5. Be ready to explain your group's rationale
-



12 Tests of a Strength

1. Does it relate to a factor or subfactor in the evaluation criteria?
2. Can it accomplish the customer's mission objectives and project requirements?
3. Does your customer concur this is a strength?
4. Does it provide a benefit that you can substantiate?
5. Is it measureable or quantifiable?
6. Can it be delivered within the customer's budget?





12 Tests of a Strength (cont.)

7. Can it be achieved within the customer's schedule?
8. Can it result in a high quality product or service?
9. Is the risk of the strength tolerable for the customer?
10. Do the competitors offer a superior strength or will their strengths neutralize your strengths?
11. Does it provide the customer with additional value?
12. Is it easy to identify and understand in the proposal?

Assign 1 point for each of the scoring criteria met





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