



Don't Gamble With Your Strategy

Up the Ante with High Quality,
High Impact Executive
Summaries

Don't Gamble..

PLAN

Don't Gamble..

PLAN

Justify
the
Need

Tools
For
Success

Why

What

How

Define
the
Team

Who

Justify
the
Need

Why

Why include an
executive summary?

Justify
the
Need

What

What kinds of
executive
summaries are you
producing?

Define
the
Team

Who

How many people does it take to
create a great executive summary?



Executive Summary Team

Define
the
Team

Who



Proposal
Lead



Sales
Lead

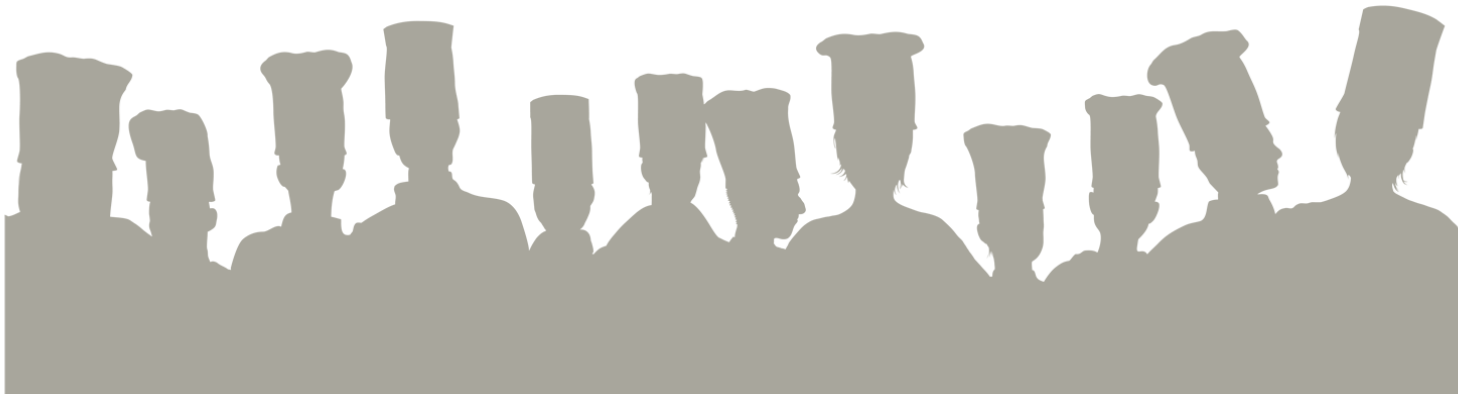


SME
Lead



Solution
Lead

You *can* have too many people
involved



Executive Summary Team

Define the Team

Who



Proposal Lead

PROPOSAL TEAM



Sales Lead

SALES TEAM



SME Lead

SALES TEAM



Solution Lead

SOLUTION TEAM



But I'm all alone



It's gonna be OK

Tools
For
Success

How

1

Collect

2

Clarify

3

Create

**Strategy & Executive
Summary Process**

Tools
For
Success

How

1

Collect

✓ Flexible tool

✓ Flexible approach



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead



Collection tool?

I don't have a collection tool



Tools For Success

How

Essential elements for your collection tool

1. Opportunity Overview
2. Client's Objectives
3. Requirements
4. Solution Overview
5. Solution Strengths and Weaknesses
6. Your Solution Benefits
7. Addressing Your Weaknesses
8. Competition Overview
9. Your Key Messages
10. Your Strategic Position

Tools For Success

How

Provide an overview of this opportunity, and any interaction with this client to date and the opportunity. If a partner is involved, please provide an overview of the partner and their involvement in this effort.

RESPONSE

Include:

Client history

- Points of Contact/Relationship
- Prior proposals

Incumbent provider(s)

Relevant details of current proposal

Partners needed to deliver solution

Tools For Success

How

1

Collect

✓ Erase writing fears

✓ Get buy-in to do the work



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead

Tools For Success

How

1

Collect

✓ Be consistent

✓ Combine and distribute



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead

Tools
For
Success

How

2

Clarify

✓ Assemble the team

✓ Review inputs together



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead



Stop it.

1. Opportunity Overview

Provide an overview of this opportunity, and any interaction with this client to date and the opportunity. If a partner is involved, please provide an overview of the partner and their involvement in this effort.

RESPONSE

OVERVIEW: Company ABC has invited us to bid before but we haven't made it to finalist before. We know that a change in leadership creates more openness to our solution because they have some quality concerns with the current vendor and there is no loyalty within the new leadership to the old vendor.

- a. **Contact:** VP of Services, Bob Smalls
- b. **Previous RFPs:** 2007, 2011

Incumbent provider(s): Company ABC

Relevant details of current RFP: Full service, all components of offering, currently no portal or dedicated service, want to expand and need growth-oriented solution. SOW is attached to RFP – very similar to the Eastern project implemented in June.

Partners needed to deliver solution: may need to use partner for call center piece, requires multi-lingual availability 24/7

Tools
For
Success

How

2

Clarify

✓ Encourage discussion

✓ Challenge answers



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead



Tools For Success

How

Essential elements for your collection tool

1. Opportunity Overview
2. Client's Objectives
3. Requirements
4. Solution Overview
5. Solution Strengths and Weaknesses
6. Your Solution Benefits
7. Addressing Your Weaknesses
8. Competition Overview
9. Your Key Messages
10. Your Strategic Position

Tools For Success

How

2

Clarify

- ✓ Combine notes
- ✓ Clarify each section
- ✓ Circle back



Proposal
Lead



SME
Lead



Solution
Lead



Sales
Lead

Tools
For
Success

How

3

Create



Draft version 1 of ES



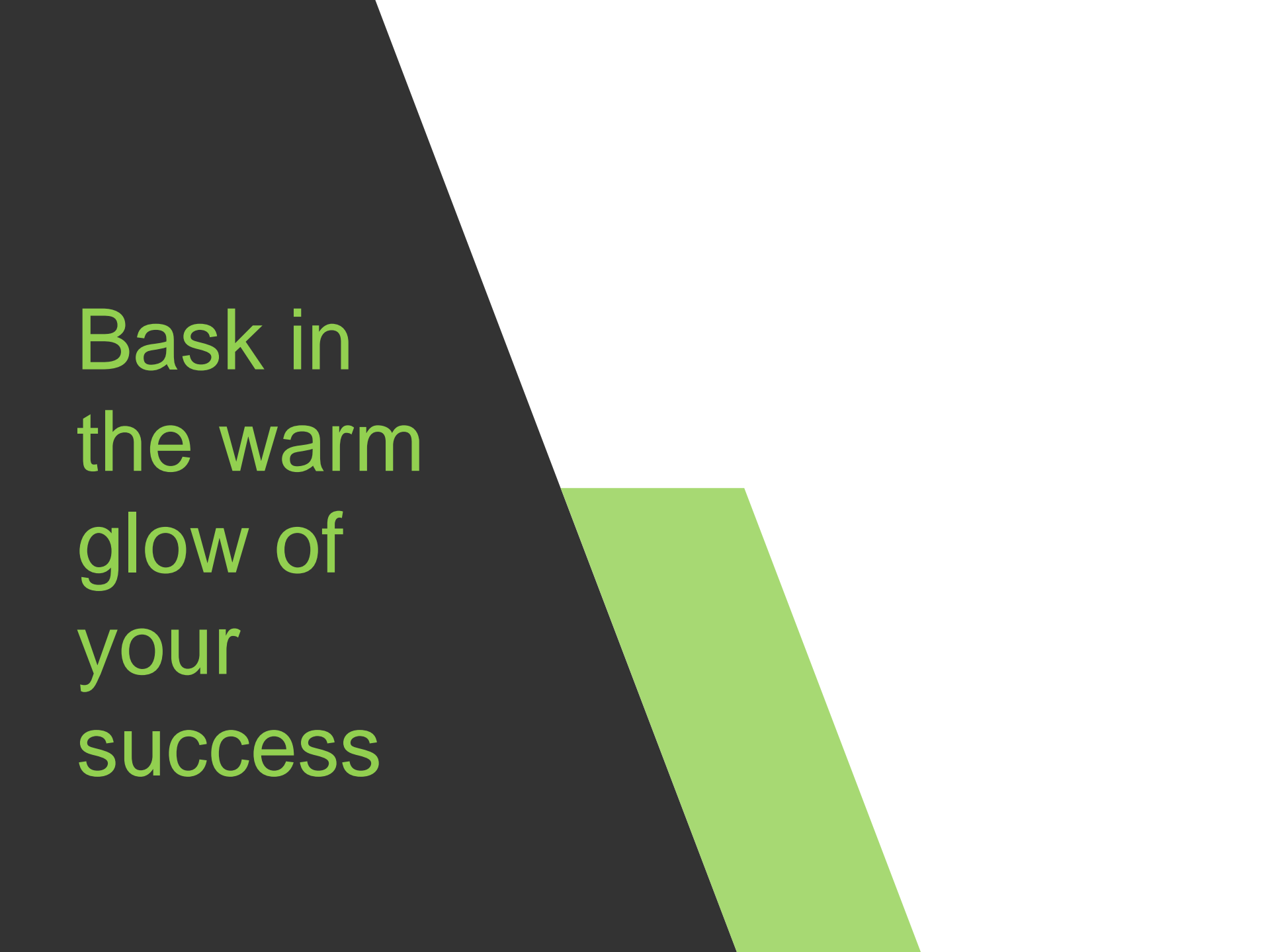
Progress to final



Proposal
Lead



Sales
Lead



Bask in
the warm
glow of
your
success

Tools For Success

How

Pro Tips

- ✓ Be clear
- ✓ Keep it simple
- ✓ It's not about you
- ✓ Avoid fluff

Don't Gamble..

PLAN

Justify
the
Need

Tools
For
Success

Why

What

How

Define
the
Team

Who



Justify
the
Need

Why

What

The executive summary presents a compelling story for choosing you and is a critical component of a high-impact proposal

Executive Summary Team

Define the Team

Who



Proposal Lead

PROPOSAL TEAM



Sales Lead

SALES TEAM



SME Lead

SALES TEAM



Solution Lead

SOLUTION TEAM

Tools
For
Success

How

1

Collect

2

Clarify

3

Create



Heather Routh, CF APMP
hr@strategicproposals.com