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The Role of the Narrator Will Be Played by Information to Win (ITW)

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Lohfeld Consulting Group Motto:

Best Informed Wins!



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Information-to-Win (ITW)

Information to Win (ITW) is the process of gathering, analyzing, and communicating information.

ITW produces a proposal that demonstrates a thorough understanding of the customer requirements and results in numerous strengths and few if any weaknesses.



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ITW Case Study

Company	Total Points	Technical Score	# Tech Strengths	Mgmt Score	# Mgmt Strengths	Cost High to Low
Challenger 1	800	Excellent	8	Good	4	1
Incumbent	750	Good	5	Good	5	2
Challenger 2	625	Good	6	Good	2	3
Challenger 3	530	Fair	5	Good	2	4
Challenger 4	500	Fair	3	Good	1	6
Challenger 5	490	Poor	3	Good	3	5

*Note Challengers 4 and 5 had several weaknesses in their approaches

The Incumbent Had Access to Detailed Information about the Customer's Requirements and Preferences and Detailed Technical Information But Still Lost



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Game – Where Did they Go Wrong?

- Evaluation Board said Challenger 5:
“provided an inadequate description of its technical approach to meet the requirements for system administration”
- What Information Did Challenger 5 Miss?



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Game – Where Did they Go Wrong?

- What Information Did Challenger 5 Miss?
 - Information about the customer's goals, objectives, and constraints related to system administration
 - Information concerning how performance is measured and reported for system administration
 - Information concerning whether there were sufficient personnel or backups to support operations, maintenance, or surges



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Game – Where Did they Go Wrong?

- Evaluation Board said Challenger 4:
“did not demonstrate an adequate approach for staffing the contract. The Offeror proposed an approach that creates a negative incentive on hiring incumbents”
- What Information Did Challenger 4 Miss?



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Game – Where Did they Go Wrong?

- What Information Did Challenger 4 Miss?
 - Information about the importance of retaining incumbents to support contract operations
 - Information about what positive incentives could be put in place to encourage incumbent retention
 - Information about why incumbents would not want to join a new company



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Information We Need to Win

1. Customer Background Information
2. Customer Requirements
3. Competitive Intelligence
4. Technical Solution Development Information
5. Management Solution Development Information
6. Price-to-Win Information
7. Past Performance and Proof Points
8. Resume Information
9. Business Proposal Information
10. Product or Tool Information



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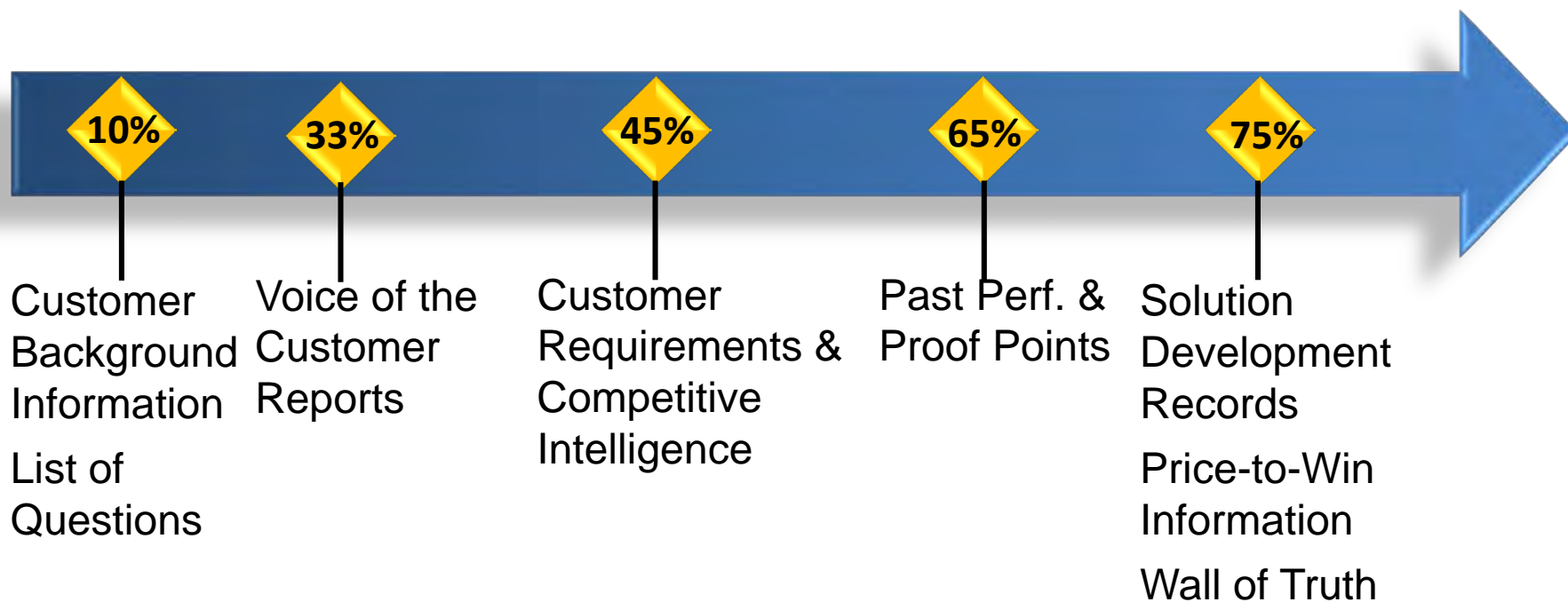
Artifacts that Support ITW

1. Customer Background Information
2. List of Customer Questions for Interviews
3. Meeting Notes After Every Customer Visit
4. Competitive Intelligence Report(s)
5. Records of Solution Design Meetings
6. Price-to-Win Information
7. Past Performance and Proof Points
8. Resume Information
9. Product or Tool Information
10. Voice of the Customer Guide for Writers or Reviewers
11. Wall of Truth (A Common List of Facts)



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ITW Schedule Before RFP Release

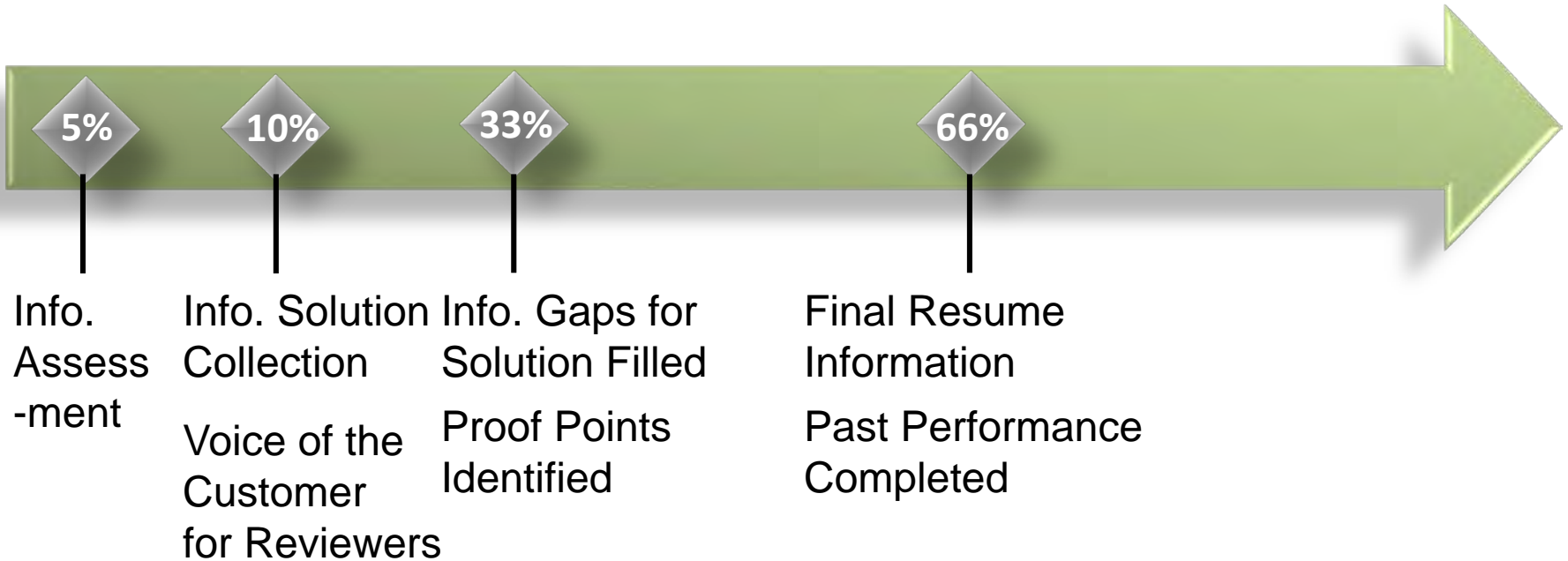


Collecting Information is an Iterative Process;
Here are a Few Pre-RFP Milestones to Consider in Collecting Your Information



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ITW Schedule After RFP Release

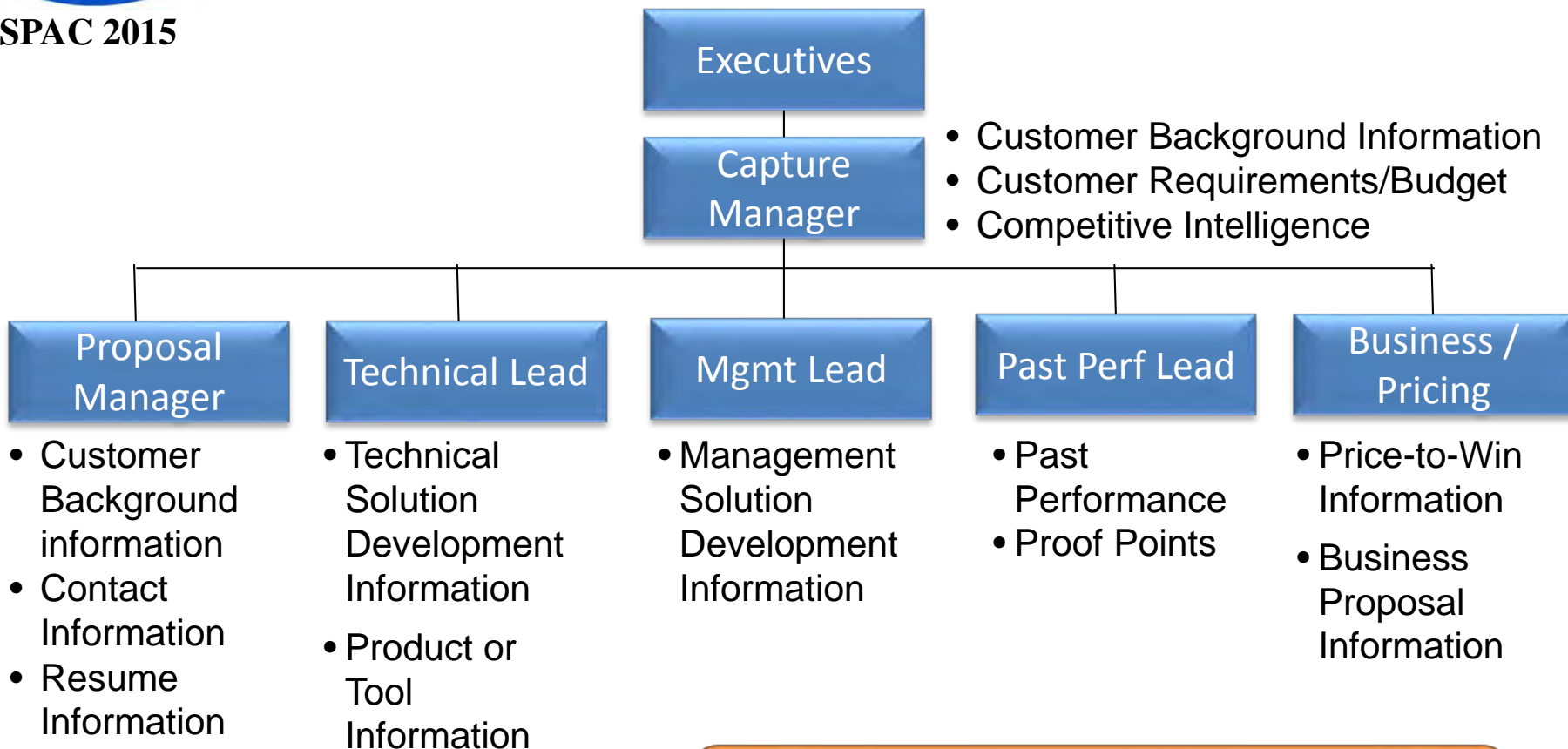


Collecting Information is an Iterative Process; Here are a Few Post-RFP Milestones to Consider in Collecting Your Information



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ITW Bid Team Members Collect

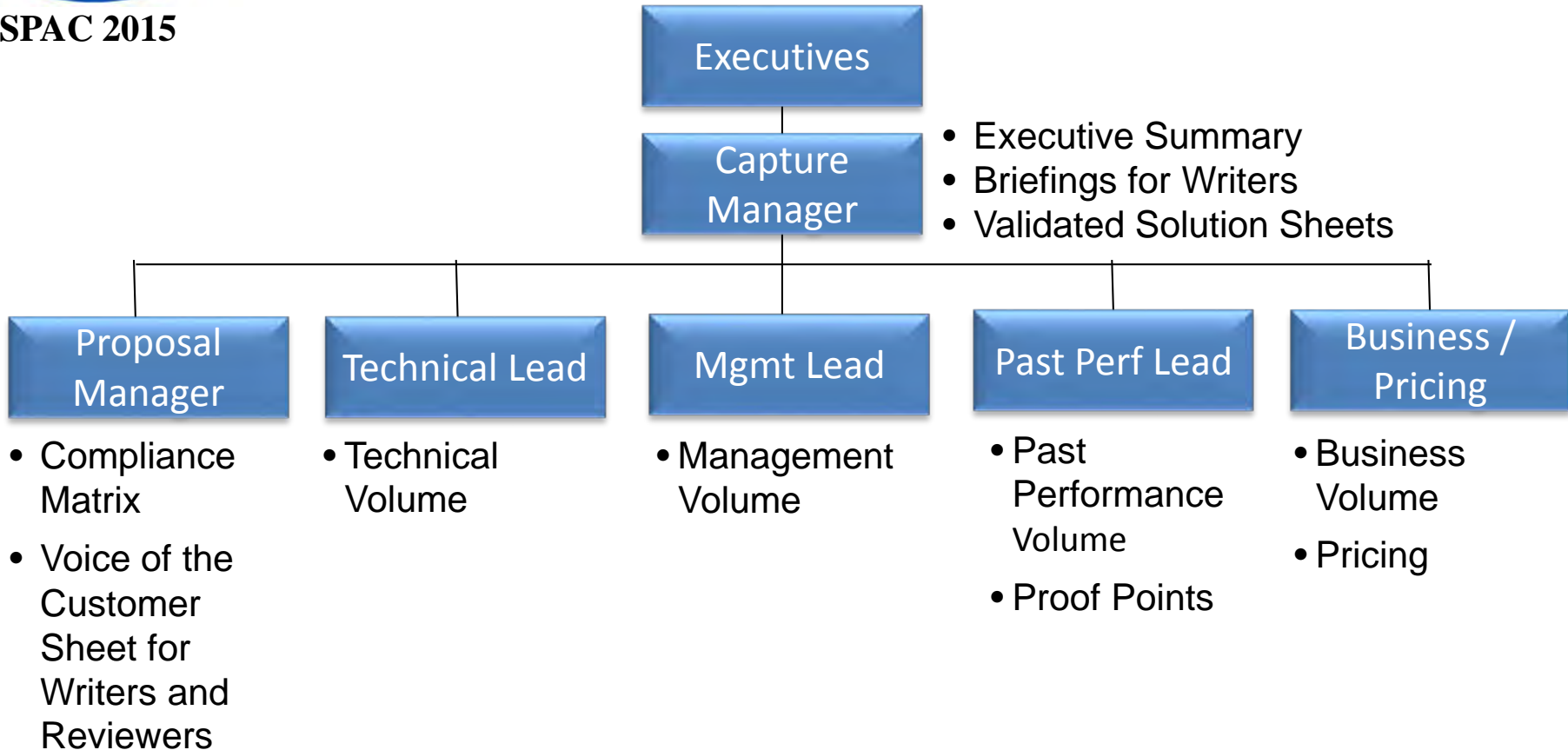


The Proposal Manager establishes rules for ITW addition, modification, and deletion



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ITW Artifacts the Team Produces





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Most Companies Need Help

- Identify **Partners** Who Can Fill Solution Gaps
- Identify **Consultants or Partners** Who Can Fill Gaps as the Voice of the Customer and/or Serve as Reviewers





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Automate the ITW Lifecycle

- Customer Relationship Management (CRM) Tools
 - Maintain contact information (email, phone)
 - Track contact schedules and meeting reports
- Collaboration and Document Management Tools (Server or Cloud-Based)
- Note-Taking Tools or Apps





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Types of Information to Collect, Manage, and Distribute



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Plan Your Customer Visit

- Before Visiting the Customer, Collect Information about the Customer's:
 - Organization and Internal Operations
 - Objectives and Priorities
 - Requirements, Challenges, and Constraints
 - Acquisition, Buying History and Budget Tolerance
 - Types of Personnel Needed to Support their Organization
 - Types of Tools Needed to Support their Organization
 - About Any Component Needed for the Technical Proposal

Take a Set of Prepared Questions with You
During a 30 Minute Meeting You Might Be Able to Ask 10 Questions



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Sources of Background Information About the Customer

- Customer Website and Internet Searches
- Federal Procurement Data System
- Paid Databases: Deltek GovWin, Bloomberg etc.
- Congressional Testimony
- Agency Acquisition Websites
- General Accountability Office (GAO) Protest Docket
- GAO Reports
- Office of the Inspector General Reports on the Agency
- FOIA documents
- Professional organization conference presentations
- Social Media (LinkedIn, Facebook, Twitter)
- Former Co-Workers and Associates



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Collect Information About the Competitors

- Competitor Organization and Internal Operations
- Competitor Objectives and Priorities
- Contracts for Past Performance
- Debrief Results for Strengths and Weaknesses
- Contract Protest Results or Legal Cases
- Conference or Professional Organization Participation
- News, Awards, Other Articles

Maintain Profiles on Your Competitors



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Sources of Information About the Competitor

- Use the following “first person” sources as long as they are not under any legal restrictions or have a Personal Conflict of Interest:
 - The competitors former employees
 - Teammates who have worked the customer or competitor
 - Consultants
 - Product vendors
- Use secondary sources as needed such as job vacancy notices or track the competitors personnel on social media



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Sources of Information About the Competitor Cont'd

- Types of Information You Should Gather:
 - Technical and Management Solutions They Will Bid
 - Key Personnel Information
 - Contract They are Likely to Include as Past Performance
 - Tools They Will Propose
 - Strengths and Weaknesses



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Analyze and Communicate ITW



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Use ITW to Analyze and Develop Solutions

- Develop a Concept of Operation Early
- Use Solution Spreadsheets Information to Develop Detailed Solutions
- Track Strengths, Weaknesses, and Gaps
- Collect Proof Points to Support Solution and Strengths



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Sample ITW Spreadsheet

RFP Req. No#	Customer Name	Solution	Gap or Weakness	Strength	Competitor Solution a
1.1.1	Scientific Technical Writing	Customer-Approved Templates, Process, and QC Handbook 5 Experienced Writers in All Disciplines Except 1	Lack of Physics Experience	The only customer-approved templates and QC handbook Excellent past performance	Similar templates for performing work for a sister agency



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Price-to-Win Information Collection is a Team Sport

- Capture Manager: Top Down Assessment of Customer's Budget
- SMEs: Bottoms Up Assessment of the Level of Effort Needed to Complete the Job
- Consultants and SMEs: Competitive Intelligence
- Recruiting: Cost and Availability of Talent Needed to Support the Job
- Human Resources: Compensation Package Needed to Recruit and Retain Personnel
- Proposal Manager: Background Information





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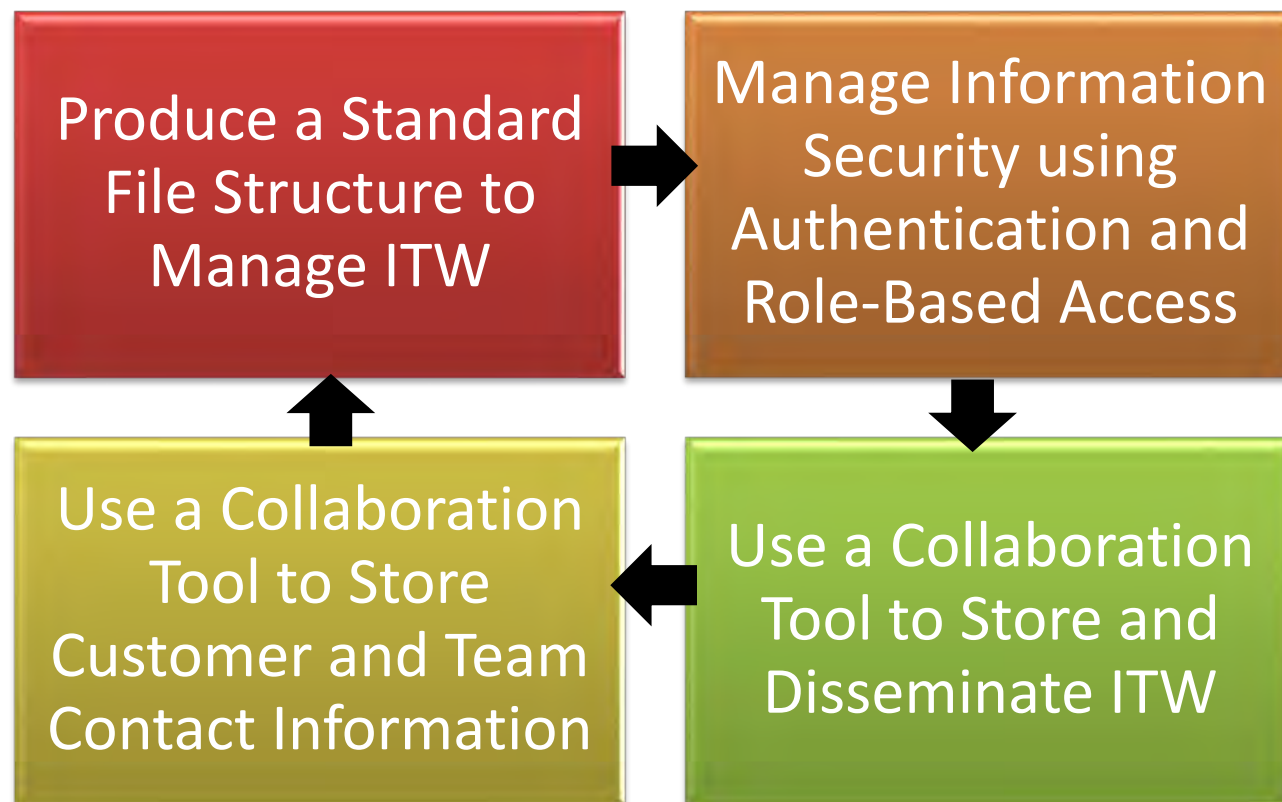
Past Performance and Proof Point Information Collection

- Update Past Performance Semi-Annually
- Collect Proof Points
- Collect Customer Quotes and Kudos



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Information Management Techniques





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Information Distribution Techniques



Information Will Be of No Value Unless, the Team Knows How to Find it, Search for it and Apply it



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ITW Support for Reviewers

- Reviewers Frequently Know the Customer, but are Not Privy to Specific Information You Have Obtained about their Requirements
- To Facilitate Color Team Reviews, Provide Reviewers with “Voice Of The Customer” Information Sheets



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ITW Voice of the Customer Information Sheets for Reviewers

Prop. Sect. No#	Proposal Section Name	Page	RFP Ref.	Customer Requirement
C.1.1	Incumbent Retention	20	L.1.2	“Must retain 100% of incumbent staff. It take a year to get a new person up-to-speed” Sam Elliott 6/15/2015
C.1.1	Incumbent Retention	20	L.1.2	“We are worried incumbent will leave because their benefits are not comparable.” Julia Jones 6/16/2015
C.1.1	Incumbent Retention	20	L.1.2	“I have a number of incumbents who telework and I need to retain them” Thomas Gerrard 6/17/2015



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Five Takeaways

1. Be Strategic in your Information Collection – Information Collection, Management, and Distribution is Costly
2. Implement Standard Information Collection, Management and Dissemination Processes and Tools
3. Control the Quality of the Information and Ensure Access to it is Secure
4. Turn Your Information into Strengths that will Meet Customer Requirements and Benefit the Customer Organization
5. Ensure Your Writers and Reviewers Understand the Voice of the Customer to Maximize their Effectiveness



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Questions

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