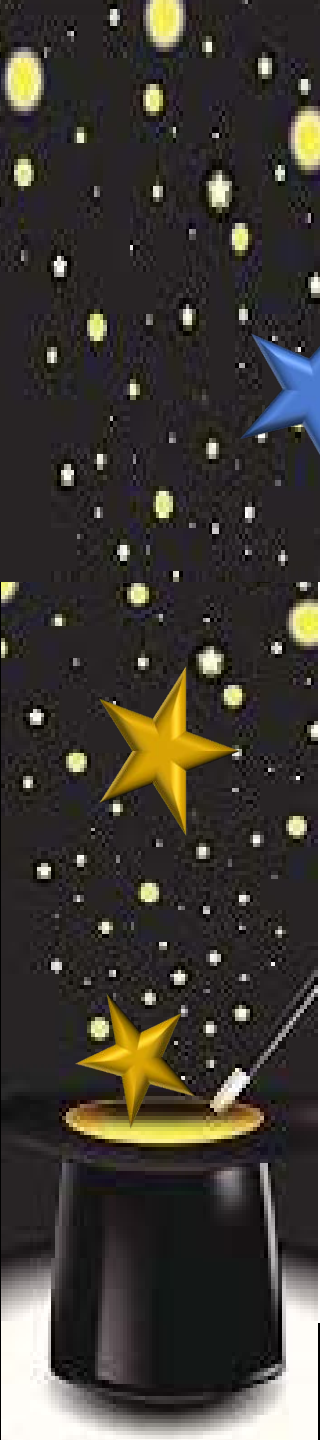




Transmogrify your Proposal Reviews from Vampiric to Valuable

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Sponsored by Georgia, Carolinas, and Florida APMP Chapters



Proposal Reviews Add Value

- “Test” the proposal as it is developed
- Provide an outside view
- Inject new knowledge and ideas
- Assess how well the proposal will score
- Provide an opportunity for leadership review and approval



Proposal Reviews Gone Bad

- Reviews conducted before the proposal draft is ready
- Too many reviews in a short proposal response
- Inadequately trained reviewers
- Review expectations unclear
- Review comments trickling in for days after the review
- Review comments changing the solution

Bad reviews suck the life blood out of the proposal team

Too Many Reviews for a Short Turn

Su	M	T	W	Th	F	Sa
February/March 2019						
24	25	26	27	28	1	2
				- FINAL RFP RELEASE		
3	4	5 - Pens Down for Pink Team Review 5pm	6 - PINK TEAM REVIEW	7	8	9
10	11	12 - Pens Down for Red Team Review 5pm	13 - RED TEAM REVIEW	14	15	16
17	18 - Pens Down for Gold Team Review 5pm	19 - GOLD TEAM REVIEW	20	21 - PROPOSAL DUE 1pm	22	23

No Time to Write the Proposal!

Typical Proposal Reviews

- Solution Review
- Pink Team (Initial Draft) Review
- Red Team (Final Draft) Review
- Gold Team (Executive Sign-Off) Review
- Pricing Reviews

Reviews Change Focus as the Proposal Matures





Solution Review

- Conduct before any proposal writing starts
- Review “the answer” for everything that needs to be written in the proposal
 - Technical approach
 - Management approach
 - Key personnel
 - Past performance
- Reviewers are those who will review at Red Team
- Review may be interactive via PowerPoint

Goal is to Avoid Comments on the Solution During Proposal Reviews



Pink Team Review

- Check compliance with RFP
- Determine if proposal reflects baseline solution
- Determine if win strategy is evident
- Identify unsubstantiated claims

Are We On the Right Track?



Red Team Review

- Review the proposal as the customer will evaluate
- Obtain a score based on the evaluation criteria
 - Strengths, weaknesses, deficiencies
 - Point scoring, if applicable
- Determine if proposal is compelling and differentiating
- Identify unsubstantiated claims

Will the Proposal Score Well?

Gold Team Review

- Provide final executive sign-off prior to final production
- Ensure that corporate policies are not violated
- Ensure that the proper corporate image is portrayed
- Confirm that the themes and messages are clear
- Perform compliance peer review

It's too late for big proposal changes



Pricing Reviews

- Pricing Strategy Review
- Incremental reviews of pricing build-up and substantiation
- Green Team - Final Pricing Review
- Gold Team Review (includes Cost/Price, Subcontracts, and Small Business Volumes)
- Executive Bid Review (varies by company)

Align Price and Non-Price Reviews to Aid in Consistency of Content

Proposal Maturity at Each Review

Review	Completeness	Maturity Level	Graphics Level	In Page Count?	Edited?
Pink Team	90% Can be missing some data (e.g., PP contact info, exact staffing numbers)	70%	Most first iteration and created by artist, some original from author	Yes	Light edit, if time permits
Red Team	99%	90%+	All created by artist, many second or third iteration	Yes	Internal
Gold Team	100%	100%	Final	Yes	Final

Set Expectations Properly for Each Review

Typical Review Timing

Review	1-Week Response	2-Week Response	30-Day Response	45-Day Response
Pricing Strategy	2	2	3	3
Initial Pricing	2	4	7	14
Pink Team	[None]	[None]	13	12
Red Team	5	7	20	25
Green/Final Pricing	6	11	22	35
Gold Team	[None]	11	26	38
Executive Bid Review	6	12	27	40
Delivery	7	14	30	45

Too Many Reviews Kill the Process



Scope of Reviews (Estimates)

- Reasonable number of pages to expect a reviewer to handle
 - Technical = 25 pages
or
 - Management = 40 pages
or
 - Past performance = 30 pages
- Length of time for reviews (including kickoff and debrief)
 - 25 total pages reviewed = 5-8 hours
 - 50 total pages reviewed = 8-12 hours
 - 100 total pages reviewed = 16-24 hours

As Quantity Goes Up, Quality Goes Down

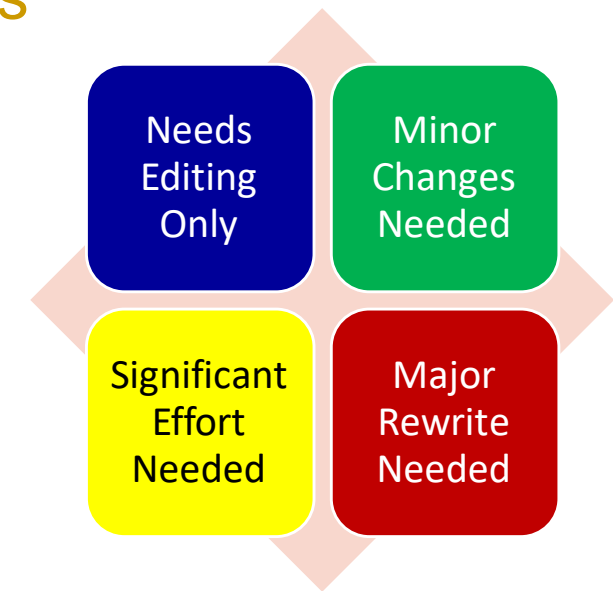
Proposal Review Best Practices

- Scoring at Red Team
- Proposal Reviewer Selection
- Defining “Good” Review Comments
- Review Logistics
- Kickoffs and Debriefs
- Post-Review Recovery



Scoring in Red Team Reviews

- Ask reviewers to score proposal sections as the evaluators will
 - Strengths, weaknesses, deficiencies
 - Adjectival ratings
 - Individual and composite numerical scores
- Ask reviewers to score sections according to level of effort required to fix



Notes on Proposal Reviewers (1 of 2)

- Continuity from Pink to Red?
 - Continuity enhances reviewer understanding of the opportunity
 - Fresh reviewers at Red Team enable more accurate representation of customer evaluation
 - Best approach is a mix of repeat and new reviewers at Red Team
- Review team composition (Pink and Red)
 - Technical reviewers from Business Area, teammates
 - Management reviewers from Group, other Groups
 - “Selling” reviewers from BD, Proposals
- Gold Team
 - Key leaders responsible for the business
 - Lead is typically Business Area owner, depending on approval authority



Notes on Proposal Reviewers (2 of 2)

- Ideal reviewers
 - Knowledge of customer, type of content
 - Ability to dedicate focused review time without distraction
- “Review Facilitator” is Proposal Manager; responsible for logistics
- “Review Leader” designated from among review team
 - Coordinate consolidation of comments for debrief
 - Mediate discussions that occur during review
- Keep secret log of reviewers over time, provide special training to recalcitrant reviewers




Characteristics of Good Review Comments

- Based on knowledge and understanding (e.g., of RFP, client, technical area, context, stakeholders, project)
- Relevant (related to RFP requirements)
- Appropriate for specific color team review (i.e., pink, red, gold)
- Identifies issues of non-compliance
- Constructive (clear, direct, specific, concrete, right level of detail)
- Suggests how to fix identified problems
- Focuses on substantive issues (not wordsmithing, grammar, spelling, formatting)
- Are appropriate and addressable given the time remaining before proposal submittal



Example Review Comments—From Bad to Useful

- 
- **Bad comment:** “This section stinks. Change it.”
 - **Mediocre comment:** “This section stinks. Look at what we wrote for ABC proposal. It’s much better.”
 - **Decent comment:** “You need to provide more detail around how you plan to provide training in-country.”
 - **Good comment:** “You need to provide more detail about how you plan to provide training in-country. We have trained approximately 25,000 individuals a month on the ABC program, which is directly applicable. You should contact Ms. XYZ for further information.”

Review Logistics (1 of 2)

- Schedule reviews well in advance to allow reviewers to block the time
- Allow reviewers to review in the evening
- Material provided in advance
 - Solicitation
 - Other customer-specific background material
 - Complete capture workbook and strategy slide decks (Pink Team only)
 - Compliance matrix
- All electronic review via proposal development environment
- Comments only rather than track-changes (can copy text into comment box to re-write)



Review Logistics (2 of 2)

- Break reviewers into teams, have team members start in different places to ensure all sections get equal coverage
- Save reviews of unevaluated executive summary for last
- Reviewer strategy and instructions
 - Identify known holes and imperfections during intro brief (e.g., missing info, sections not yet edited)
 - Have reviewers focus on content, not editing
 - Tell us what's wrong, then tell us how to fix it

Set Up the Reviewers to Succeed



Review Kickoffs

- Send RFP out in advance, but assume reviewers will not read; do kickoff in advance—maybe even the previous day, and use it to help the reviewers get into the heads of the evaluators
- Kickoff content
 - Purpose and expectations
 - Customer background
 - Opportunity summary
 - Competitor summary
 - Win themes (Pink Team only)
 - Review teams, review assignments, starting point
 - Known holes and imperfections
 - Review logistics, including schedule
 - Refresher instruction on use of proposal development environment

Kickoffs are Critical to Set Reviewer Expectations



Review Debriefs

- Include time for reviewers to meet to discuss findings prior to debrief
- Review Leader facilitates consolidation of summary comments into debrief
- Debrief contains only high-level comments (proposal team will review all written comments)
- Include summary scoring by volume and section
- Provide recommendations for where proposal needs the most attention
- Debrief is ‘transmit-only’ – not an opportunity for proposal team to engage in defense of proposal draft or discussion of review comments
- If under duress, debrief can be provided via email

Debriefs Provide the Proposal Team With Overall Guidance

Review Recovery (1 of 2)

- Proposal leadership team convenes immediately to discuss high-level results
- Proposal leadership team determines if author assignments need to be adjusted
 - Sections with very few comments may be consolidated with single author to finalize
 - Sections in deep trouble may need new author
 - As proposal progresses, number of authors diminishes as key authors take on larger role
- Proposal Coordinator consolidates all comments by section and distributes to authors
- Authors parse comments by difficulty to address



Review Recovery (2 of 2)

- Comments that require key management decisions are escalated to proposal leadership team immediately
- Not all comments must be incorporated
- For comments not incorporated, authors should discuss with reviewer to explain rationale (avoid getting the same comment at the next review)
- Build list of interdependencies, so when you change something in one place in the proposal you know what else needs to change

Don't Start Re-Writing Without a Recovery Plan

Summary: Key Tips

- Structure reviews to help you win, not to follow a process
- Don't conduct a review if you're not ready for it
- Set reviewer expectations early, provide training on how to review if needed
- Reviews provide insight on how the proposal will score, according to the evaluation factors
- Reviewers say what's wrong, then recommend how to fix it





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