

# *Charting The Course To Quality*

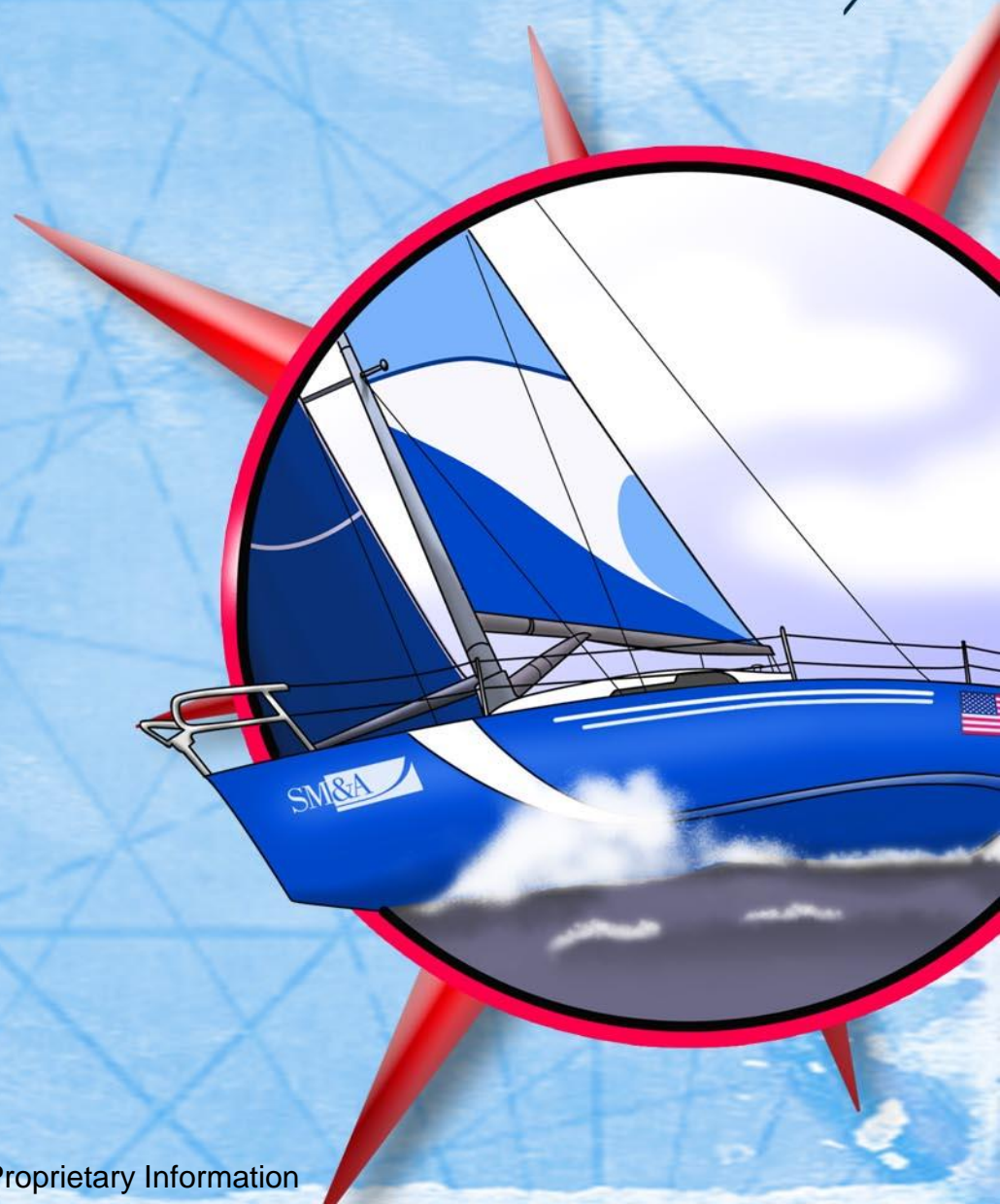
## **Proposal Management**

**by  
George Coutoumanos**



*Success Makers*

SM&A Proprietary Information



# *Charting The Course To Quality*

## **Introduction**

**Who is George Coutoumanos?**

**Goal**

**Objectives**

**Agenda**



# George Coutoumanos



# Who is George Coutoumanos?



## Key Attributes

- Creative Strategic, Tactical and Competitive Analysis Planner
- Rated Tactical Fixed and Rotary Wing Aviator
- Broad Airframe, Avionics and Ordnance Business Development and Technical Background

## Background

- SM&A Associate
- Proven winning proposal manager with experience on prime airframe, avionics, ordnance, network solutions, vetronics, robotics and armored vehicle proposals
- Experienced in airframe, airframe avionics and ordnance business development
- Experienced in corporate advertising and public relations
- Former Pentagon Army General Staff Officer
- Former tactical combat experienced pilot
- Award winning teacher and instructor

## Significant Projects

- Proposal Manager – Accenture,
- Proposal manager for United Defense on FCS Armed Robotic Vehicle (ARV)
- Leader for Lockheed Martin on JSF Integrated Baseline Review
- Executive Summary Lead for General Dynamics on ICE2
- Specification Performance Lead for General Dynamics on DD(X) Blue Team
- Proposal Manager for Northrop Grumman on Multi-Role Armament and Ammunition System (MRAAS)
- Orals Volume Lead for Raytheon on Small Diameter Bomb
- Technical Volume Lead for TRW on UK Bowman Radio

## Education and Awards

- BS Marketing and Business Management, Troy State
- Graduate courses, Naval PG, Monterey, CA
- United States Army Aviation Qualification
- Armed Forces Staff College, Norfolk, VA

## Clearance

- Top Secret

# Goal

Describe the

# ***LEADERSHIP***

and

# ***MANAGEMENT***

roles and responsibilities of an SM&A proposal manager in preparation of a client's proposal and provide information that will help you become a better proposal manager.

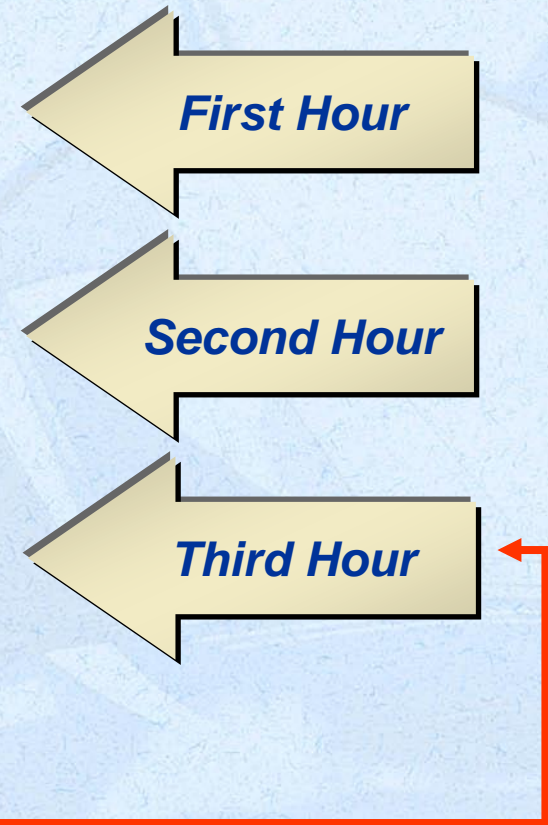
*Your volume leaders have clear metrics of progress, quality and the delight of structure...  
You have an amorphous blob of responsibilities.*

*Robert Gurin*

**Uncertainty will always be part of the taking charge process.**  
**- Harold Geneen**

# Objectives

- Identify **LEADERSHIP** skills required for successful proposal management
- Demonstrate an understanding of the **MANAGEMENT** skills required for successful proposal management
- Participate in a learning exercise demonstrating successful and unsuccessful methods used in dealing with **“THE PROPOSAL FROM HELL”**
- Share our proposal “lessons learned” with each other



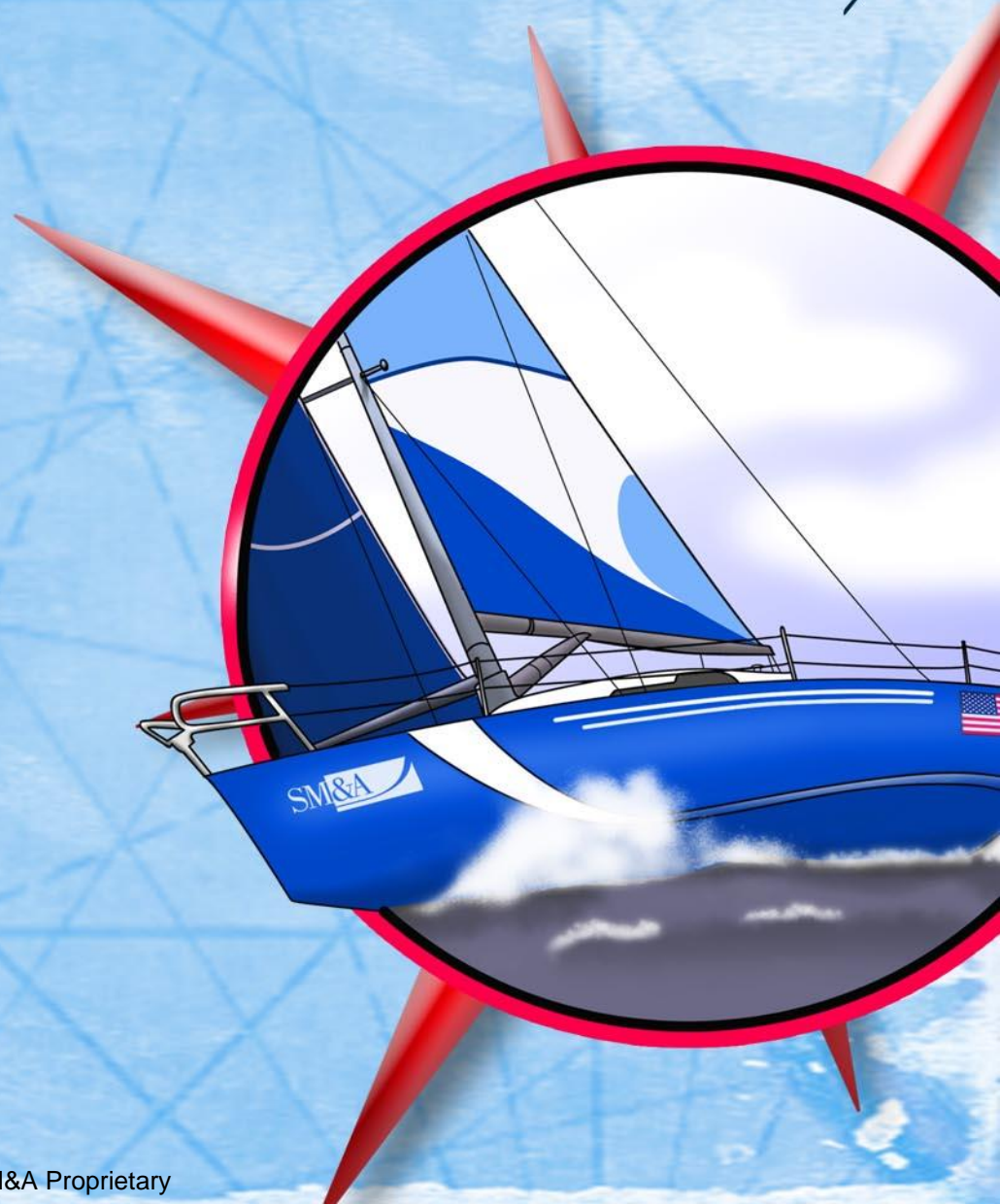
Hell, there are no rules here - we're trying to accomplish something.  
- Thomas A. Edison

# Agenda

Topic	Time Estimate
Welcome/Introduction	0:10
Proposal Leadership	0:50
Break	0:10
Proposal Management	0:50
Break	0:15
<b><i>“The Proposal from Hell”</i></b>	
Interactive Exercise	0:50
Sharing Lessons Learned	0:20
Summary	0:10
Evaluation	0:10

# *Charting The Course To Quality*

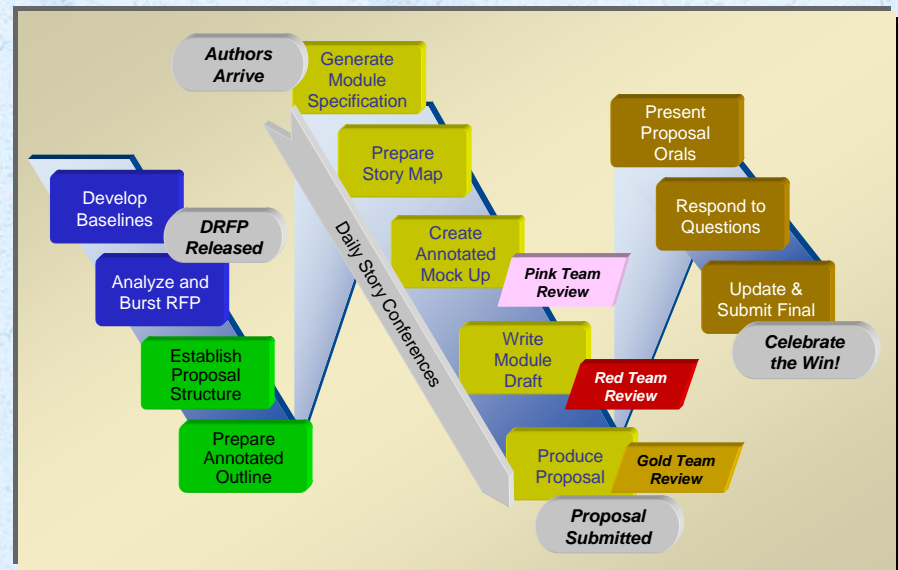
## **Proposal Leadership**





# Proposal *LEADERSHIP*

**PROCESSES  
DON'T DO  
WORK,  
PEOPLE DO.**



Leadership is the art of getting someone else to do something you want done because he wants to do it. - Dwight D Eisenhower

# Successful Proposals Require **MANAGEMENT** and **LEADERSHIP** Skills

## THE MANAGER

- Relies on systems
- Counts on controls
- Administers
- Maintains
- ***Does things right***

## THE LEADER

- Relies on people
- Counts on trust
- Innovates
- Develops
- ***Does the right thing***

Managers are people who do things right, while leaders are people who do the right thing. - Warren Bennis

# The Business of Leadership

## WHAT WE'VE BEEN DOING

- Win by not losing
- Customer defines strategy and we work the themes
- Primary function of IGH was new business
- Only one thing to do – everything
- My way or the highway

## WHAT WE MUST DO NOW

- Win by being smart
- We shape the strategy
- Contract execution is of equal priority
- B&P is constrained
- Leadership by consensus

People are more easily led than driven. - David Harold Fink

# Fundamental Leadership

The Proposal Manager	Leading the Team	Managing the Team	Leading the Individual
<b>Defining Objectives</b>	Seek progress reports Maintain standards Check performance/results Gather forecasts	Progress meetings Co-ordinate effort Broadcast results Direct effort	Discuss achievement <b>Encourage</b> high standards Resolve conflict Use procedures sensibly
<b>Planning Organizing</b>	Build on success Set new objectives Summarize progress Revise plans	Discuss failures Set higher targets <b>Reward</b> success Build team spirit	<b>Encourage</b> ideas Appraise performance Train, support, guide Set new targets
<b>Monitoring</b>	<b>Set personal example</b> Decide actions Be enthusiastic Think ahead	Progress meetings Co-ordinate effort Broadcast results Direct effort	Discuss achievement <b>Encourage</b> high standards Resolve conflict Use procedures sensibly
<b>Developing</b>	Build on success Set new objectives Summarize progress Revise plans	Discuss failures Set higher targets <b>Reward</b> success Build team spirit	<b>Encourage</b> ideas Appraise performance Train, support, guide Set new targets
<b>Leading</b>	<b>Set personal example</b> Decide actions Be enthusiastic Think ahead Delegate tasks	Inform and involve <b>Encourage</b> success Share problems Give care and support Meet expectations	<b>Encourage</b> self-discipline Praise and reward effort Listen to suggestions Give responsibility/authority Develop rapport

Lead and inspire people. Don't try to manage and manipulate people.  
Inventories can be managed but people must be lead. - Ross Perot

# Fundamental Leadership Realities

- The best Proposal Managers have the ability to **quickly ramp-up**
- You are **not** the Subject Matter Expert (SME) so don't pretend you are one
- **Listen** to your crew, client team members, and subcontractors
- **Read** the RFI/RFP/RFQ a hundred times
- Then **read it again**
- Now, kick back and **THINK** – let your crew do their thing

# Fundamental Appearance

- Not only in first impressions, but also in ongoing interactions.
- Sociolinguist Albert Mehrabian found that in a face-to-face encounter:
  - **7** percent of a verbal message comes from the words used
  - **38** percent comes from the vocal tone, pacing, and inflection
  - **55** percent of the message is transmitted by the speaker's **APPEARANCE** and body language.

# Fundamental Proposal Failure

## ***OR – HOW TO SET YOURSELF UP TO FAIL***

- Micromanaging your crew, and client team
- Failure to heed warnings from your production crew
- Failure to keep schedule
- Failure to follow the SM&A proposal preparation process
- Failure to review content as proposal develops
- Failure to be aware of proposal status



**Only two things are infinite, the universe and human stupidity, and I'm not sure about the former. – Albert Einstein**

# The Proposal Leader

- Articulate a ***vision*** of the proposal
- Keep team ***focused***
- Look for strong ***discriminates***
- Insist on ***substantiation***
- Be dedicated to ***quality***
- Have a clear ***win strategy***
  - Tell it to your crew
  - Tell it to your client team
  - Tell them again

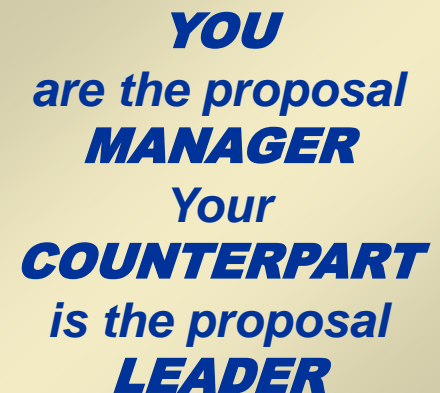


# Leading the Proposal

- Early on, forge a relationship with your Proposal Lead counterpart
- You do all the dirty work
- Talk with him/her all the time
  - But mostly at the end of the day
  - Then plan the next day
  - Break him out; keep him rested.
- You run the Pink and Red Team
  - Break out the client team
  - Break out your crew

# Leading the Schedule

- Insist on decisions when they are due
- Track all proposal activities
- Maintain an accurate proposal status
- Include status reports in the daily “All Hands” meetings
  - Action Items – Proposal Manager
  - Progress metrics for art - Production
  - Progress metrics for volumes – Book Bosses
  - Decision progress – Proposal Leader



***YOU***  
***are the proposal***  
***MANAGER***  
***Your***  
***COUNTERPART***  
***is the proposal***  
***LEADER***

# Leading Team Motivation

- “My Way or the Highway” is not the best motivation technique - though there are occasions when it is appropriate
- Positive motivators - desire for:
  - Attention
  - Recognition
  - Achievement
  - Personal growth
- Negative motivators - fear of:
  - Humiliation
  - Management disapproval,
  - Exclusion

**Leaving a trail of broken bodies may not be the most efficient method of leading a proposal. - Dave McDevitt**

# Conflict Resolution and Motivation of **RECALCITRANT** Clients

- Every recalcitrant client is different, but try:
  - Highlighting something good
  - Pointing out what needs improving
  - Suggesting how to improve
- In any client group there are bound to be problems
- As the proposal manager, you have to solve or at least contain them:
  - Light incense
  - Dance naked around an open fire
  - Wear war paint
  - Look like you know what you're doing

***REMEMBER - if a client team member is not capable enough, you are held responsible for the resulting failure***

# SM&A Code of Conduct

- Always give the client value
- Be professional
- Inspire the client
- Respect the client
- Project a positive team image
- Do not abuse the client's facilities
- Avoid elitism
- Obey all applicable laws and regulations
- Do the right thing

The quality of a leader is reflected in the standards they set for themselves. - Ray Kroc, Founder of McDonald's

# Proposal Manager Responsibilities

## Pre-RFP Checklist

- Define the SM&A client's proposal process
- Identify program manager
  - Chief engineer
  - Business development lead
  - Business manager
  - Subcontract manager
  - Cost and contracts manager
- Identify company divisions, teammates, subcontractors and key suppliers
- Program/proposal strategy and tactics
- Competition assessment
- Baseline programmatic approach
- Baseline design
- Proposal themes
- Proposed cost boogie (from top down assessment)
- Proposal preparation schedule
- Identify SM&A type people required and make arrangements
- Proposal kickoff package
- Proposal volumes, book bosses and outlines
- Other key people: SOW, WBS, BOE's, risk, simulations, IMP, IMS, etc.
- First draft of hardware quantities and usage
- First draft of WBS
- First draft of program level SOW
- First draft of overview schedule
- First draft of organization
- First cut at extent of test program
- SM&A training for proposal team
- Establish regularly scheduled status meetings
- Identify SM&A type people required

## Post-RFP Checklist

- Burst RFP
- Assign RFP Sections to individuals to digest content and summarize at Kickoff Meeting
- Prepare Proposal Preparation Schedule consistent with RFP instructions
- Identify all Book Bosses and key people
- Hold Proposal Meeting
- Review Proposal Requirements and Management Team, if needed
- Ensure that proposal staffing plans are appropriate per RFP and being implemented
- Book Bosses develop their Volume review schedules
- Identify Review Teams, their charters, members, schedule and firm up Review Plans
- documentation plans, ensure they are written down and Stated at Daily Meeting
- Meet with Contracts to firm up the Contracts preparation plans, ensure they are written down and Stated at the Daily Meeting
- Meet with Pricing/Cost Lead to firm -up Cost Volume data gathering and Meet with Subcontracts to ensure their tasks are accounted for in the proposal plan and Cost and contracts Volumes plans
- Push Hardware Quantities and Usage List (HQUL) development
- Develop Focus Box for each 1 and 2 digit section and Theme Sentences for each 2 digit section
- Spot check Story Map and AMU reviews
- Periodically pull out Focus Boxes and check them for strategy/themes
- Prepare Daily Meeting status charts and oversee the meeting
- Develop CRs and DRs Response Plan
- Develop BAFO Plan
- Develop SM&A personnel off -load plan and communicate with personnel and SM&A HQ

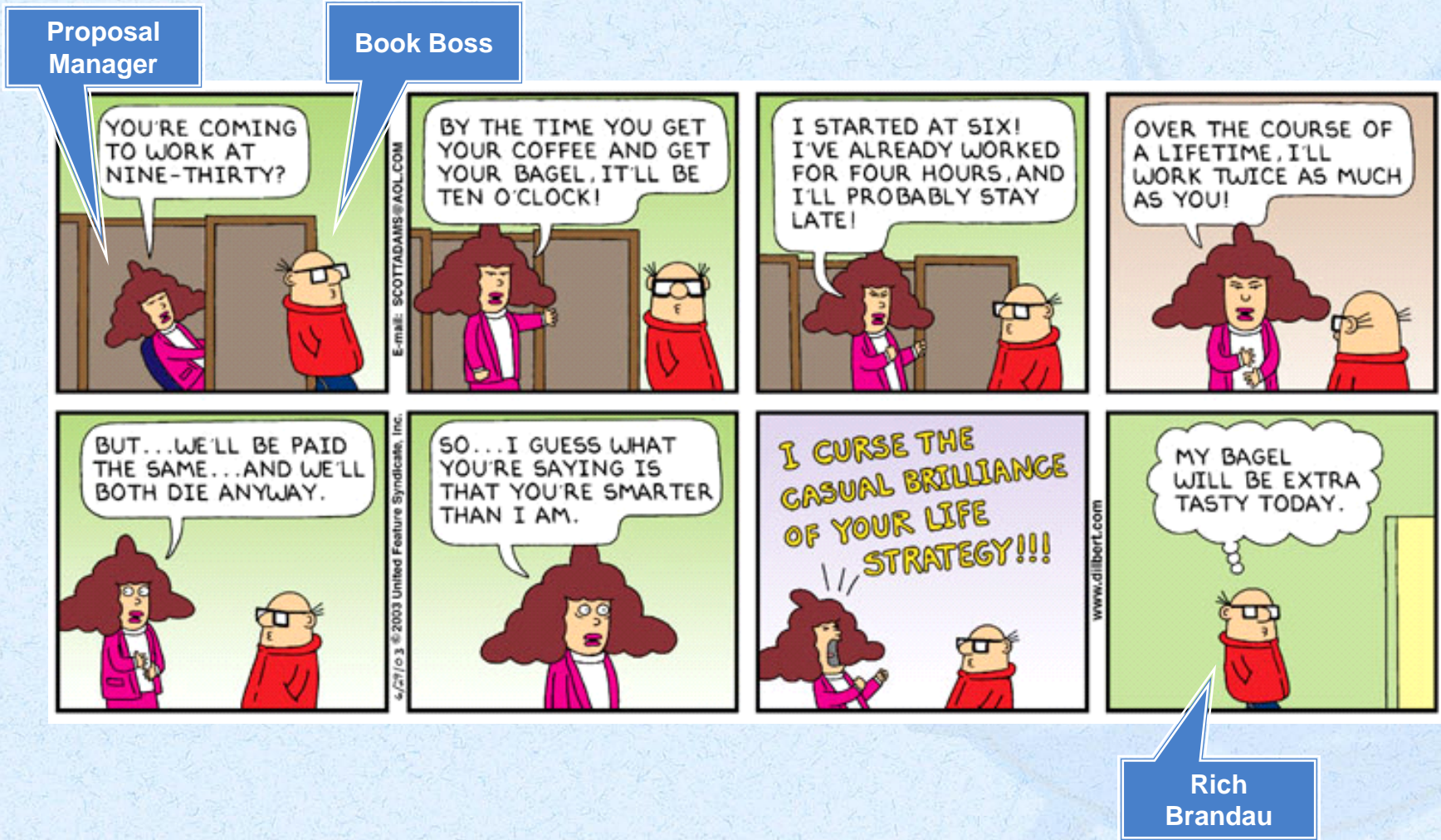
**YOU HAVE ONE HELLAVA LOT TO DO**



# Finally – the Segue

- The SM&A Proposal Process is specifically designed to facilitate implementation of this **LEADERSHIP** model:
  - Incremental steps
  - Frequent reviews
  - Visible progress
  - Client management interaction

# TAKE A 10 MINUTE BREAK

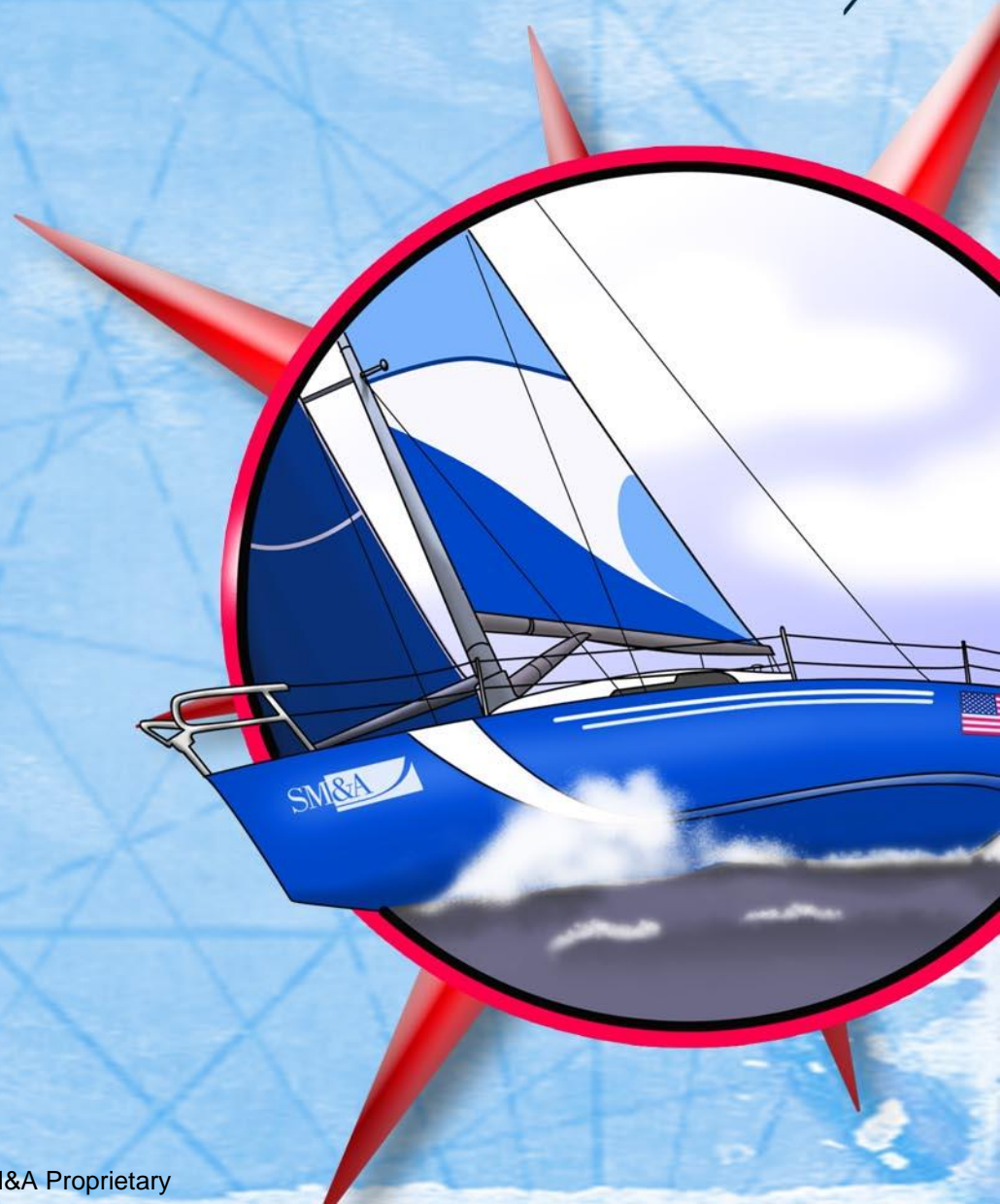


On occasion, Book Bosses really suck. – George Coutoumanos



# *Charting The Course To Quality*

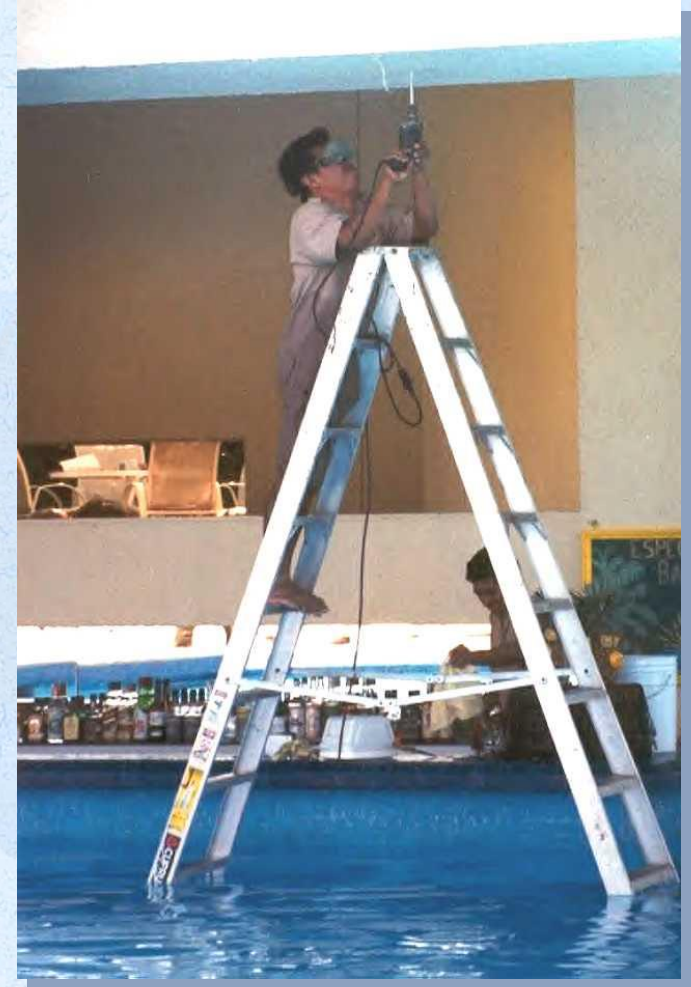
## **Proposal Management**



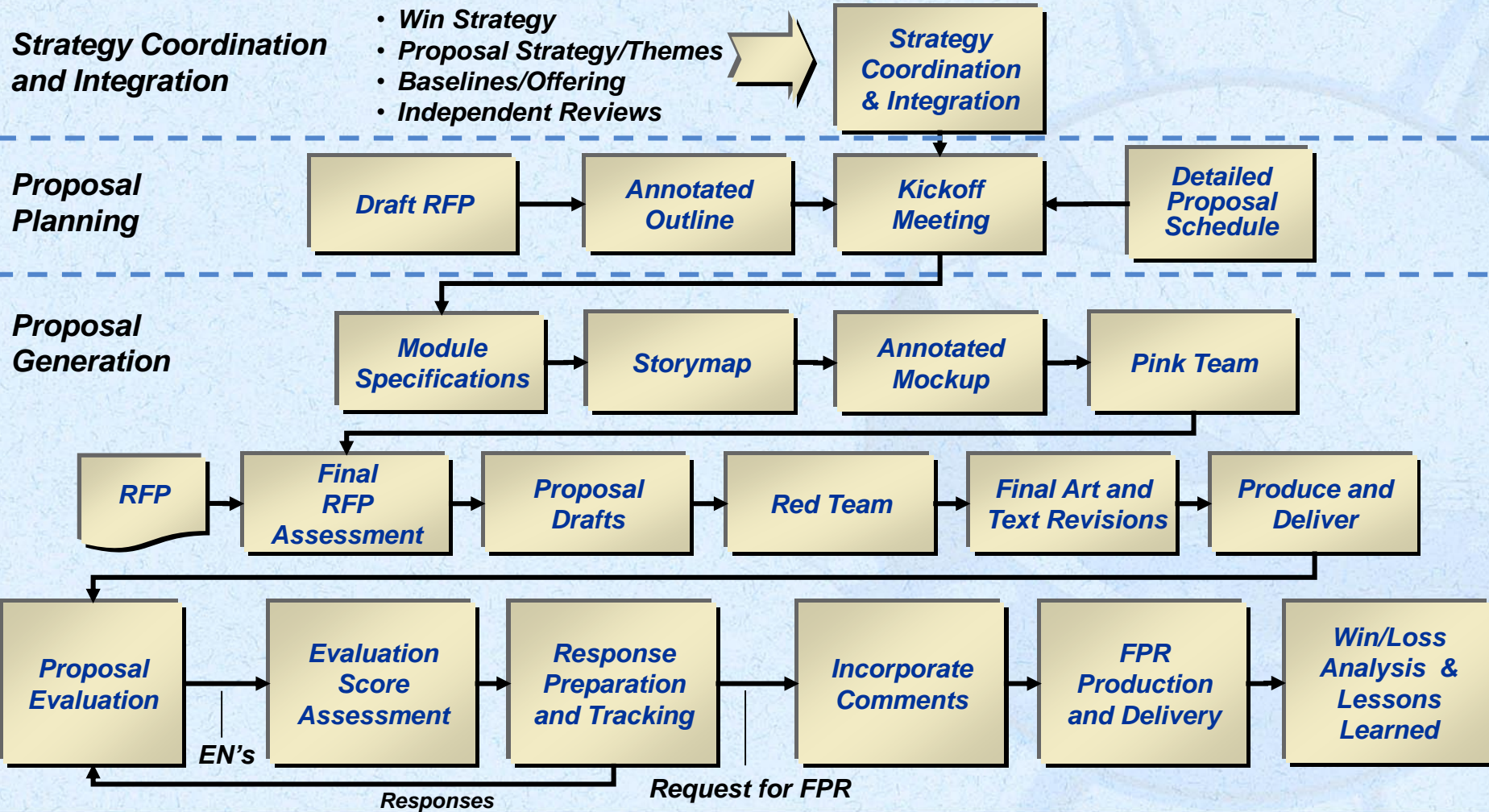
# Proposal *MANAGEMENT*

**MOST OF WHAT WE  
CALL  
*MANAGEMENT*  
CONSISTS OF  
MAKING IT  
DIFFICULT FOR  
PEOPLE TO GET  
THEIR JOBS DONE.**

*- Peter Drucker -*



# Fundamental Proposal Process



# Fundamental Proposal Truths

- To win, you must first not lose
- Writing a proposal is a process of discovery
- Technology is cross-leveled

**Widgets rarely win anymore, yet developing the technical solution typically consumes 85% of the B&P budget**

- Therefore, it's about risk:
  - Technical risk – this is Key Personnel **SKILL-SETS**
  - Management risk – this is **KEY PERSONNEL**
  - Schedule risk – this is **PAST PERFORMANCE**
  - Cost risk – this is **TECHNICAL and SCHEDULE RISK**

**Ninety percent of this game is half mental. - Yogi Berra**

# The Fundamental Proposal Manager

- You are the advocate of:
  - Compliance
  - Responsiveness
  - Winning
- You “not lose” with **COMPLIANCE**
  - ↳ *The requirements (L and M)*
- You “win” with **RESPONSIVENESS**
  - ↳ *The Statement of Work*
- Winning is an **ATTITUDE**,
  - ↳ *A way of life, a self-concept*

A winner takes from the ordinary, and makes the extraordinary.  
- Nancy Smith

# The Fundamental Client

**Most times the job you run is considered a “must win” by the company that hired us. When you hear this, don’t be fooled.**

<b>Proposal is <i>Staffed</i> at all levels</b>	Not just a “core team” of five or six people, but genuinely staffed
<b>Proposal has its <i>Own Area</i></b>	Not sumptuous, but adequate
<b>Proposal Management is an <i>Ally</i></b>	We are trying to preserve their jobs
<b><i>Graphics and Production</i></b>	Support is ready to go
<b>Senior Management is <i>Supportive</i></b>	Not just talk, but interested in Win Strategy, listens to our problems with their people, takes appropriate actions we recommend,
<b>The <i>Right Resources</i></b>	Computers, Printers, Phones, Copiers, Fax Machines, Badges, Projector and Screen
<b><i>Sufficient Budget</i></b>	Make sure that you and the client understand the job, level of effort.

**Unless the job meets this criteria, it’s not a must win: - Dave McDevitt**

# Fundamental Responsibilities

## CREATE THE WINNING PROPOSAL

### DEFINE THE PROPOSAL PLAN

### LEAD THE PROPOSAL TEAM

**Execute the Win Strategy**

*Participate in its development and ensure its execution to schedule*

**Help shape the acquisition**

*Coordinate everything seen by the customer*

**Ensure quality of the proposal**

*Review and approve all products  
Enforce the process and approve process tailoring*

**Communicate status to management**

*Elevate problems early*

# First Thing – Build a Schedule

- The schedule must be ***comprehensive***, not just:

- Kickoff
- ModSpec
- Storymap, etc.

- Schedule items become your ***Action Item*** list
- Track all proposal activities in Action Items

- Include status reports in daily “All Hands” meetings

**Proposal Schedule =s Action Item List**

Written Response Event/Task/Milestone	April							Action Items	Action Assigned	Date Assigned	Action Due Date	Action Complete
	M	T	W	Th	F	Sa	Su					
DLA-IDE Proposal Kickoff								DLA-IDE Proposal Kickoff	T. Cameron	24-Apr-03	22-Apr-03	22-Apr-03
RFQ Comment Development								RFQ Comment Development	T. Cameron	24-Apr-03	28-Apr-03	28-Apr-03
ModSpec Development								ModSpec Development	P. Mitchell	24-Apr-03	28-Apr-03	28-Apr-03
ModSpecs Complete								ModSpecs Complete	P. Mitchell	24-Apr-03	29-Apr-03	29-Apr-03
IDE Point Design								IDE Point Design	Jon Hill / Dorival Simoes	24-Apr-03	30-Apr-03	30-Apr-03
RFQ Comments Due								RFQ Comments Due	G. Coutoumanos	24-Apr-03	30-Apr-03	30-Apr-03
Receive GSA Schedules								Receive GSA Schedules	T. Smith / Jane Middleton	24-Apr-03	1-May-03	
StoryMap Development								StoryMap Development	P. Mitchell	24-Apr-03	1-May-03	
StoryMaps Complete								StoryMaps Complete	P. Mitchell	24-Apr-03	2-May-03	
Develop WorkPlan/WBS								Develop WorkPlan/WBS	M. Rodriguez	24-Apr-03	2-May-03	
Map FSS/GSA LCs to DLA IDE LCs								Map FSS/GSA Labor Categories to DLA IDE Labor Categories	T. Smith / Jane Middleton	24-Apr-03	2-May-03	
Request Copies of SubK GSA Schedules								Request Copies of Subcontractor GSA Schedules	T. Smith / Jane Middleton	24-Apr-03	6-May-03	
Establish PTW Targets								Establish PTW Targets	TBD	24-Apr-03	9-May-03	
Key People/PP Selected								Key People/PP Selected	David Plesko	24-Apr-03	9-May-03	
Teaming Agreements Complete								Teaming Agreements Complete	Tom Malsack	24-Apr-03	9-May-03	
Estimate Workplan Effort								Estimate Workplan Effort	T. Smith	24-Apr-03	9-May-03	
Art Development								Art Development	P. Mitchell	24-Apr-03	15-May-03	
Build BPA Tables								Build Blanket Purchase Agreement Tables	Jane Middleton	24-Apr-03	16-May-03	
AMU Development								AMU Development	P. Mitchell	24-Apr-03	15-May-03	
AMUs Complete								AMUs Complete	P. Mitchell	24-Apr-03	16-May-03	

Get a copy to IGH and your Account Manager



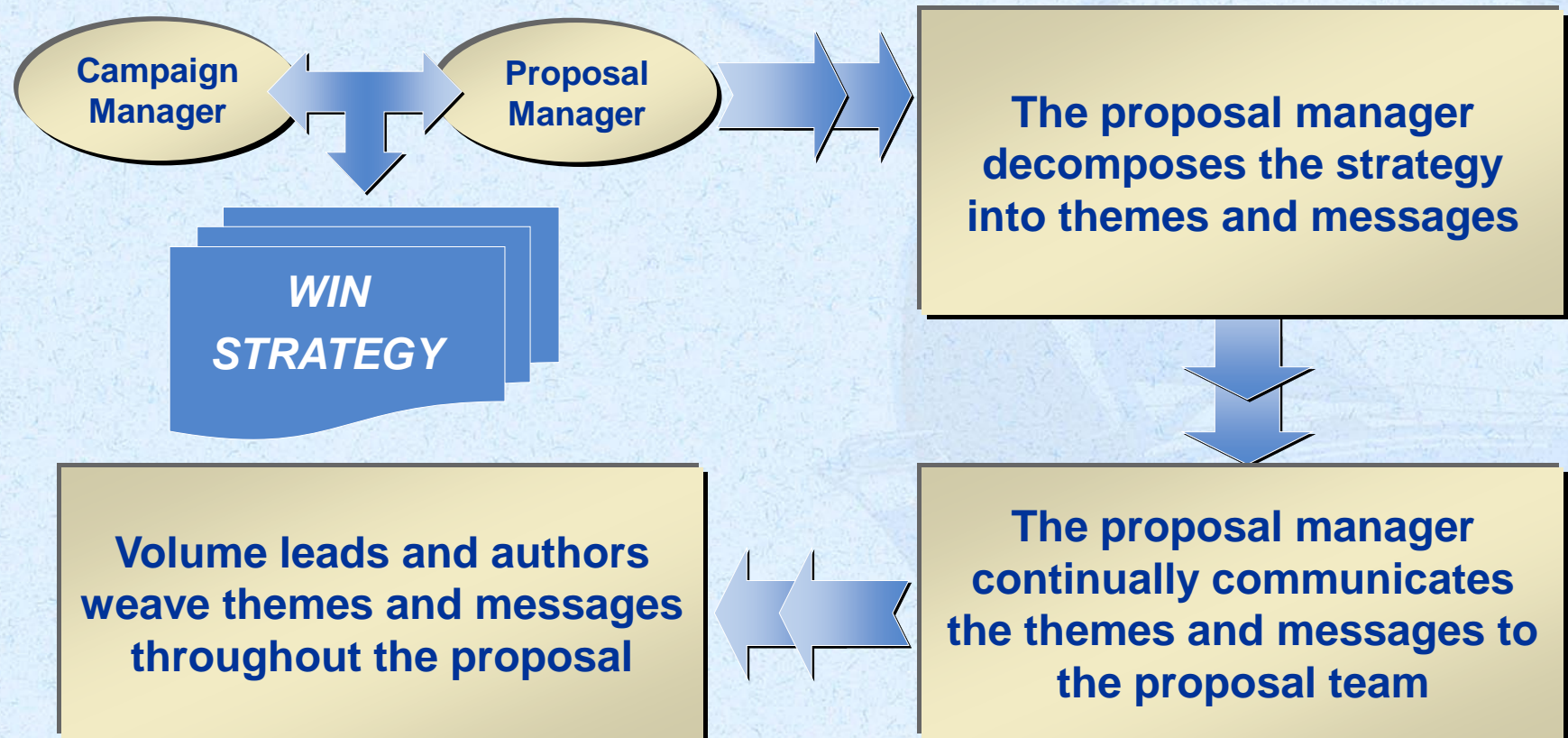


# Concurrently...

- One-on-one with ***Director of Security***.
  - Crew badges - 24/7 Access
  - Employee numbers
- One-on-one with ***Director of Facilities***:
  - Crew/Team/Subcontractor work areas
  - Phones/ Voice Mail
  - Computers
- One-on-one with ***Director of IT***:
  - All computers loaded with required SW
  - Internet accounts/access
  - Production high-end computers:
    - 21” Screens
    - CD burners
- One-on-one with **Production**

# Starting the Proposal

***Incorporation of strategic themes and messages is the difference between winning and losing***



# Working the Baselines

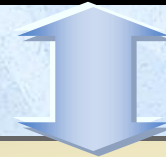
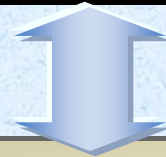
***Baselines are integrated into the proposal by the proposal team***

## Technical Baseline

- *Facts & analysis results*
- *Product design*

## Management Baseline

- *Architecture of program plan*
- *How organizations and systems interact to control cost and schedule risk*



## Proposal Management

- *Gathers baseline data*
- *Evaluates RFP and baselines to ensure compliance*
- *Helps identify and document features and benefits of our approach*

**Authors**



***Baseline documents are provided to authors at the proposal kickoff***

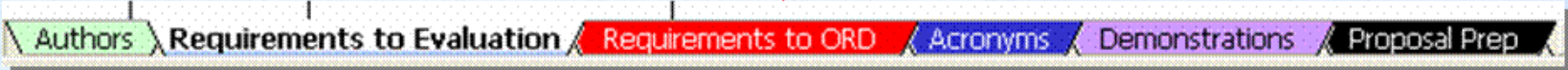
# The Annotated Outline

## USE MULTIPLE SHEETS

- Author roster
  - Assignments
  - Page counts
  - Contact list
- “L” to “M”
- “L” to SOW
- “L” to ORD
- Acronyms
- Demo’s / Orals
- Proposal Preparation Instructions

*Leaves more room for “L” to “M” and “L” to SOW*

Response Chapter	RFP Section	Title	4.0 ESP Proposal Instructions and Requirements	Performance of Work, Evaluation Factors and Award Process
1.4	4.3.2.1.4	Use of Leading Tools in Technology Categories	For each of the technology categories listed in Section 2.6.2, describe how each of the categories will apply to the high-level design, and which products would be used and how they would be used.	<p><b>2.6.2 IDE Technology Categories</b>                      The IDE architecture will be based on eight technology categories:</p> <ul style="list-style-type: none"> <li>• Integration Brokers</li> <li>• Business Process Manager/Business Rules Engine</li> <li>• Communications Middleware</li> <li>• Web Integration Servers</li> <li>• Application Integration Servers</li> <li>• Extraction, Transformation and Loading (ETL) Tools</li> <li>• Security</li> <li>• Metadata Management</li> </ul>
				For each category, DLA has identified a set of leading vendors and products based on research by Gartner, Inc. Descriptors of the categories and leading products are in Appendix 1. In addition, DLA has identified approved software products in its DLA IT Technology Solutions document, version 2.03, November 2002.
				The design proposed by the ESP may be composed of vendors and products from the Gartner list, the DLA IT Technology Solutions document and/or vendors and products that are not on either list.
				Not all of the products on the Gartner list currently appear in the DLA Solutions document. For software proposed by the ESP that is on the Gartner list, but not on the DLA list, DLA will take appropriate actions for it to be added. For software selected by the ESP that is not on either list, appropriate rationale for the products use must be provided by the ESP to DLA to support an action to have the products added to the DLA list.
			It is not required that the ESP specify the final choices for each product category in the RFP response.	
			The ESP must provide sufficient detail to demonstrate an understanding of the products it has identified as applying to the IDE solution, and that the products identified will be utilized in implementing IDE.	<p><b>2.13.2.2 Use of Leading Tools in Technology Categories</b>                      For each technology category described in Section 2.6.2 and Appendix 1, the ESP should specify which tools will be used in the high-level design of IDE and how the tool will be used to provide the required IDE capabilities.</p>
				<p><b>2.13.4 Implementation Road Map</b>                      The ESP will produce a detailed implementation road map for the projects of IDE that addresses each of the following areas:</p> <ul style="list-style-type: none"> <li>• Each system, data store and interface that will be impacted by</li> </ul>



# The Annotated Mock-Up

## **MAKE COMPLIANCE OBVIOUS**

- Take the **customers** words and rewrite in **client** first person
- Write to every directed item, and do so in the order given

We “**not lose**” with **COMPLIANCE** to the requirements

<u>Direct Cut from Final RFQ</u>	<u>Making compliance obvious</u>
<p><b>4.3.2.1.4 Use of Leading Tools in Technology Categories</b></p>	<p><b>1.4 Use of Leading Tools in Technology Categories</b></p>
<p>For each of the technology categories listed in Section 2.6.2, describe how each of the categories will apply to the high-level design, and which products would be used and how they would be used.</p>	<p><i>Theme statement</i></p>
<p>It is not required that the ESP specify the final choices for each product category in the RFQ response. The ESP must provide sufficient detail to demonstrate an understanding of the products it has identified as applying to the IDE solution, and that the products identified will be utilized in implementing IDE.</p>	<p><b>1.4.1 IDE Technology Categories</b> Following is the Accenture Team's application of products to the technology categories described in RFQ Section 2.6.2 and how each of the categories is applied to the high-level design.</p>
<p>The response should include a description of the planned approach for metadata management.</p>	<p><b>1.4.2 IDE Technology Tools</b> Our Team has identified the necessary products and refined the application of these products to create the solution for a successful path to DLA's vision of IDE.</p>
	<p><b>1.4.3 Metadata Management</b> Our approach to Metadata Management...</p>

# The Module Draft

## ***DRIVE-IN THE RESPONSIVENESS***

### 2.13.3.2 Use of Leading Tools in Technology Categories

For each technology category described in Section 2.6.2 and Appendix 1, the ESP should specify which tools will be used in the high-level design of IDE and how the tool will be used to provide the required IDE capabilities.

You “**win**” with  
**RESPONSIVENESS** to  
the Statement of Work

**1.4.1 IDE Technology Categories**  
Following is our application of products to the technology categories described in RFQ Section 2.6.2. Figure 1.4-1 shows how each category fits within our high-level design.

Figure 1.4-1. We selected leading tools with proven track records to reduce risk and match the technology categories requirements.

Volume I – Technical Proposal  
The information on this page is proprietary to Accenture LLP.  
Source Selection Information – Open PWS 3.004

1-23

accenture

# Six Dirty Words

(Stan Gutkowski – Alpha Male, Accenture Federal)

- 1. *Best Efforts:*** Courts interpreted "best efforts" to impose a strict legal obligation, that goes beyond normal duty to a client.
- 2. *Ensure:*** Creates binding legal obligation that a customer can enforce in court. Do not use insure or assure either.
- 3. *Guarantee:*** Amounts to a warranty our client could be held accountable for.
- 4. *Partner/Partnership:*** Legal term meaning a relationship in which two parties are liable for each other's acts, omissions and debts.
- 5. *Will meet your needs:*** A customer's requirements change during the course of a project. Courts have held companies liable based on such promises.
- 6. *Joint/Jointly.*** May legally imply that a deliverable is a "joint" work under law, meaning ownership is shared by both parties.

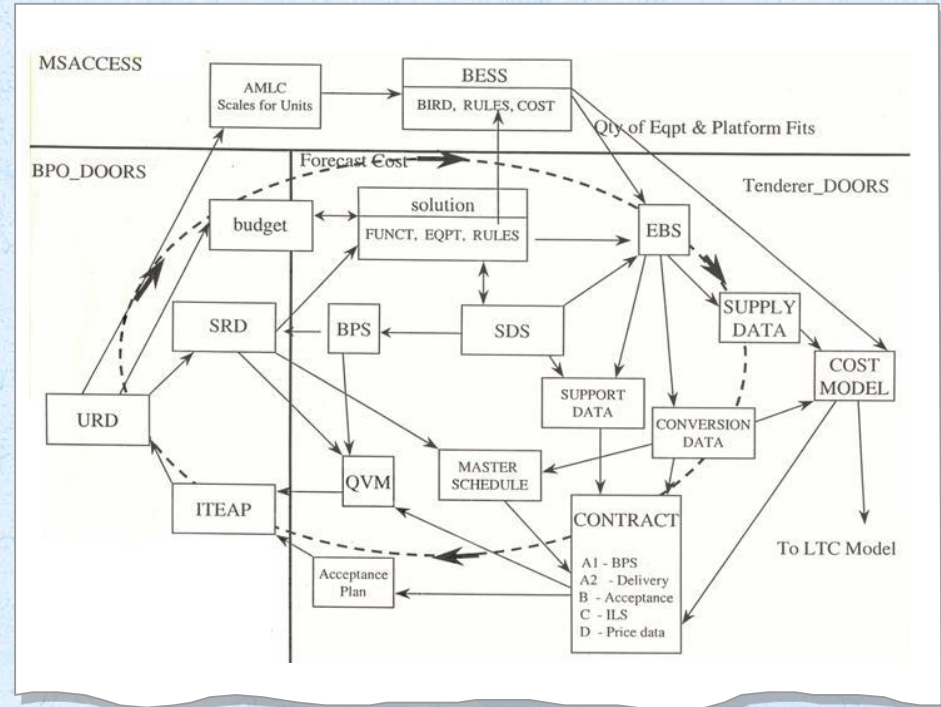
# Instructions to the Government on Receipt of a Contractor's SOW

- “When using the following words, make the contractors define exactly what is to be **performed** and when it shall be **delivered**”:
  - as
  - will
  - etc.
  - as required
  - as necessary
  - periodically
  - technical support
  - analysis
  - planning
  - assistance
  - control
  - interface
  - monitoring
  - developing
  - operation
  - training
  - implementation
  - management
  - testing
  - efficient and reliable exchange
  - maximum uptime
- “Make sure the contractor **qualifies** these **terms** and the **metrics** and **reporting process** they will use.”



# Working the Art

- Art is always the long pole in the tent.
  - Configuration control is the most difficult item to manage in proposal management.
  - Do not review and signoff art – that is the Book Bosses job.
  - Review the art on the wall.
  - **Run the proposal, and think a lot.**



# Remember...

We “**not win**” with just a Technical solution

*But we must have an excellent Technical solution.*

We “**win**” with our Past Performance

*Schedule risk will be determined by our Past Performance*

We “**win**” with our Key Personnel

*Management risk will be determined by Key Personnel skill-sets matched to our Technical solution*

We “**win**” with our Price Proposal

*It is always about price – I don't care what they say*

**WE CAN WIN ALL OF THE ABOVE AND LOSE AT THE ORAL's or DEMO**

# ***TAKE A 15 MINUTE BREAK***

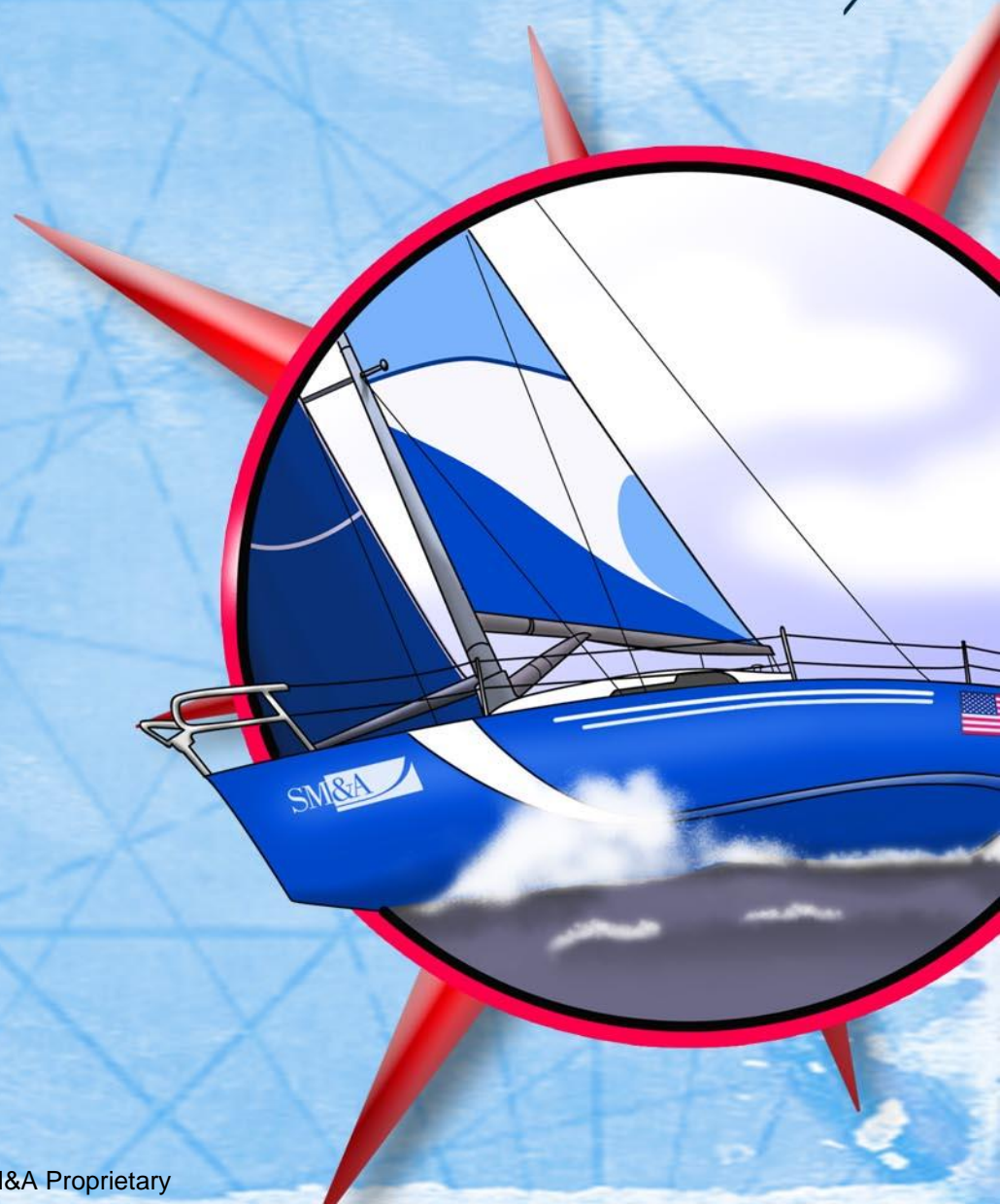
**BEWARE THE  
LOLLIPOP OF  
MEDIOCRACY.  
LICK IT ONCE  
AND YOU  
SUCK  
FOREVER**



**It's more magnificent than mediocre. - Sam Goldwyn**

# *Charting The Course To Quality*

## **The Proposal from Hell**



# An Interactive Exercise

# THE PROPOSAL FROM HELL



# 1A. The Set-Up

- ***The Big Bang Corporation*** (BBC)
- ***Bidders list*** for a Tank and Automotive Command (TACOM)
- Armament Research, Development & Engineering Center (ARDEC)
- ***Draft RFP*** for the ***Steel on Target System*** (SOTS),
- ***Phase 2*** effort.

# 1B.The Set-Up Continues

- The Draft RFP calls for five volumes:
  - 1. *Executive*** Summary
  - 2. *Technical*** Volume
  - 3. *Management*** Volume
  - 4. *Program Management*** Volume
  - 5. *Program Cost*** Volume
- There are no page count limitations
- It's 14 days before release of the Final RFP.

## 2. Scenario to Designate Proposal Manager

- Director of Operations came from [REDACTED] knows SM&A.
- A “must win” program
  - 60 day proposal preparation
  - \$250k SM&A effort
    - Win Strategy
    - Price to Win
    - Proposal Manager
    - Tech Volume Book Boss
- The other four volumes have in-house Leads.
- All PDC functions, including production are responsibility of the client and handled in house.



### 3. Scenario to Designate Proposal Manager

- You are the Proposal Manager for the Big Bang, Steel on Target System
- You arrive, and meet all the players;
- You are confronted by the gentleman who has always run the proposals for Big Bang at this facility.
- He begins by telling you how he intends to run this proposal
- Tells you where he expects you to fit in.

## 4. Scenario for Audience

- During the conduct of the Win Strategy, you meet the client team;
  - Program Manager
  - Chief of Engineering
  - Chief of Contracts
  - Person responsible for costing
  - Several of the designated authors
- You learn that the Client:
  - Has been working this program under a Study Contract from [REDACTED] for the past 18 months
  - is convinced that [REDACTED] “loves their solution”

## 5. Scenario to Designate Proposal Manager

- Your Book Boss arrives early into the Draft RFP
  - This is his first SM&A gig
  - For the last five years he ran the PDC at [REDACTED]
  - You discover his computer skills are marginal
- Quick to side with authors who do not like the SM&A process
- Does so at the morning All Hands meetings
- He sees no need to track art with travelers
- Wants to return art to authors for soft copy modification

## 6. Scenario to Designate Proposal Manager

- Big Bang Corporation is a fenced area covering a half mile
- Your desire is to have all the authors work out of the PDC
- Computers in the PDC were unsatisfactory
- Some of the problems encountered were:
  - Compaq “iPacs” had no peripherals (floppy or CD)
  - Not capable of “spell-checking” in Microsoft Word
  - Most of the computers had 64MB of RAM
  - No two computers configured the same
  - The LAN web base was Netscape Navigator
    - US Government is Internet Explorer based
    - [REDACTED] items invisible during searches
    - LAN portals not optimized for graphic-rich printing

## 7. Scenario to Designate Proposal Manager

- Mind-set geared to single phase Draft RFP:
  - Phase 2, \$8M FFP
  - 60 day proposal effort
- Final RFP three phases:
  - Phase 2, \$16M
  - Phase 3, \$32M CPFF
  - Phase 4, ROM
  - 45 day proposal effort
- Not sufficiently staffed to write and produce Final RFP
- Phase 1 Steel on Target System (SOTS) Trades Study is siphoning off key personnel
- Big Defense Corporation (BDC) ***will*** acquire the Big Bang Corporation prior to the submittal of the proposal

## 8. Scenario to Designate Proposal Manager

- The proposal strategy evolved to:
  - Finish program by the end of Phase 3
  - Use all of Phase 4 for risk reduction
- To confirm strategy need a ROM for Phases 2 and 3
- To get the ROM, must get a SOW to the Subcontractors
- Affirmation of proposal strategy is occurring late
- Your counterpart is being sucked into the on-going Due Diligence with the Big Defense Corporation

## 9. Scenario to Designate Proposal Manager

- Final RFP changed Draft RFP construct of proposal
  - AMUs are bogging down
  - Art continues to be a problem
- Fewer authors are showing up at the morning All Hands
- Program Manager and Chief Engineer on travel most of the time
- Phase 1 effort is still underway
  - Book Boss pressed into helping finish the Phase 1 deliverable
  - With the blessings of the Director of Operations
- Management Volume Lead is an alcoholic
- Director of Operations is not writing the Executive Summary

# 10. Scenario to Designate Proposal Manager

- Both Draft RFP and Final RFP required an IMP and IMS
- Program Manager is the “go-to” guy for doing a WBS
  - He had done something like them before
  - “...they were just called by a different name now”
  - He finally admits that he needs help
- You go to IGH and they get you one of the very best.
  - The Program Manager continues to fashion the WBS
  - IMP/IMS crewman went to work trying to catch up
- Program Manager keeps changing construct of the WBS
- Your IMP/IMS crewman asked him to freeze construct
  - Is rudely thrown out of his office
  - Not once, but many times



# 11. Scenario to Designate Proposal Manager

Pink Team is a disaster in two ways:

- ***Disaster One:***
  - Production owned by alcoholic Management Volume Lead
  - Consists of two part time secretaries, one part time graphics illustrator, and a union print shop.
- ***Disaster Two:***
  - Pink Team rates your AMU effort red
  - Some authors wrote text in their AMU's
  - Others did as they were told
  - This made the modules that followed directions look incomplete when compared to the fully written sections.
- You need help, and your Division Director knows it
- He opens the purse strings - tells you to get what you need

## 12. Scenario to Designate Proposal Manager

- IGH gets you:
  - Two experienced SM&A integrators
  - Two editors
  - Executive Summary author
  - You now have an SM&A crew of seven.
- Information Technology (IT) improved portal speed
- But the computers have received only minimal upgrades
- Art configuration control is in shambles
- Full complement of client authors are still not on hand
- Making the situation worse, the author working on the largest section, Lethality:
  - Went from his assigned 30 pages to 80
  - Refuses to shorten it or even stop growing it.

# 13. Scenario to Designate Proposal Manager

- Red Team is overall low yellow – not a friendly read
- The good news – integration and production worked better
- The bad news is the BDC bought BB
- You have seven days left to bag the proposal
- After consulting with the “costers”, you find that BDC costs from different buckets
- Bottom line – the cost volume has to be totally redone
- Lady in charge of the cost volume broke out in Shingles
- Rouge engineer still working in soft copy

# 14. The End Game

- Two high-end computers were found for the integrators
- Installed 48 hours before the proposal was due to ship
- This led to a production crunch
- Cost volume to production 12 hours before drop-dead ship
- The production Cost Volume arrived 15 minutes before ship time
- Big Defense Corporations name spelled wrong in all the footers.

***THE PROPOSAL WAS COMPLIANT,  
BUT NOT VERY RESPONSIVE.  
IT WAS LOST ON TECHNICAL RISK***

# *Charting The Course To Quality*

## **Sharing Lessons Learned**



# Lessons Learned

1. It's not about you; it's about your client.
2. Writing a proposal is a process of discovery.
3. Develop a schedule, and ensure your crew and client team believe it.
4. To win, you must first not lose.
5. You not lose with compliance, and you win with responsiveness.
6. It's all about risk; Technical, Management, Schedule, and Cost.

# Lessons Learned

7. The Proposal Manager is the advocate of ***compliance, responsiveness, and winning.***
8. The Program Manager is the advocate of a doable program – ***do not let him author.***
9. The Chief of Engineering is the advocate of the technical solution – ***do not let him author.***
10. You are responsible for taking on, and teaching “new guys”.
11. Never be afraid to ask IGH or your buddies in the field for help or advice.
12. Correct your and your crew screw-up’s when they are discovered.

# Lessons Learned

## 13. Early on, YOU:

- Determine that all Authors and the PDC have the software dictated by the RFP/RFQ.
- Determine that the PDC has high-end machines, large screens, print and CD burn capabilities.
- Determine that printers print the colors you see on the computer screen.
- Meet with Security – establish client and proposal security requirements.
- Meet with Client's head of IT – get your crew computers.
- Meet with the Client's head of Facilities – get your crew workstations and good chairs.

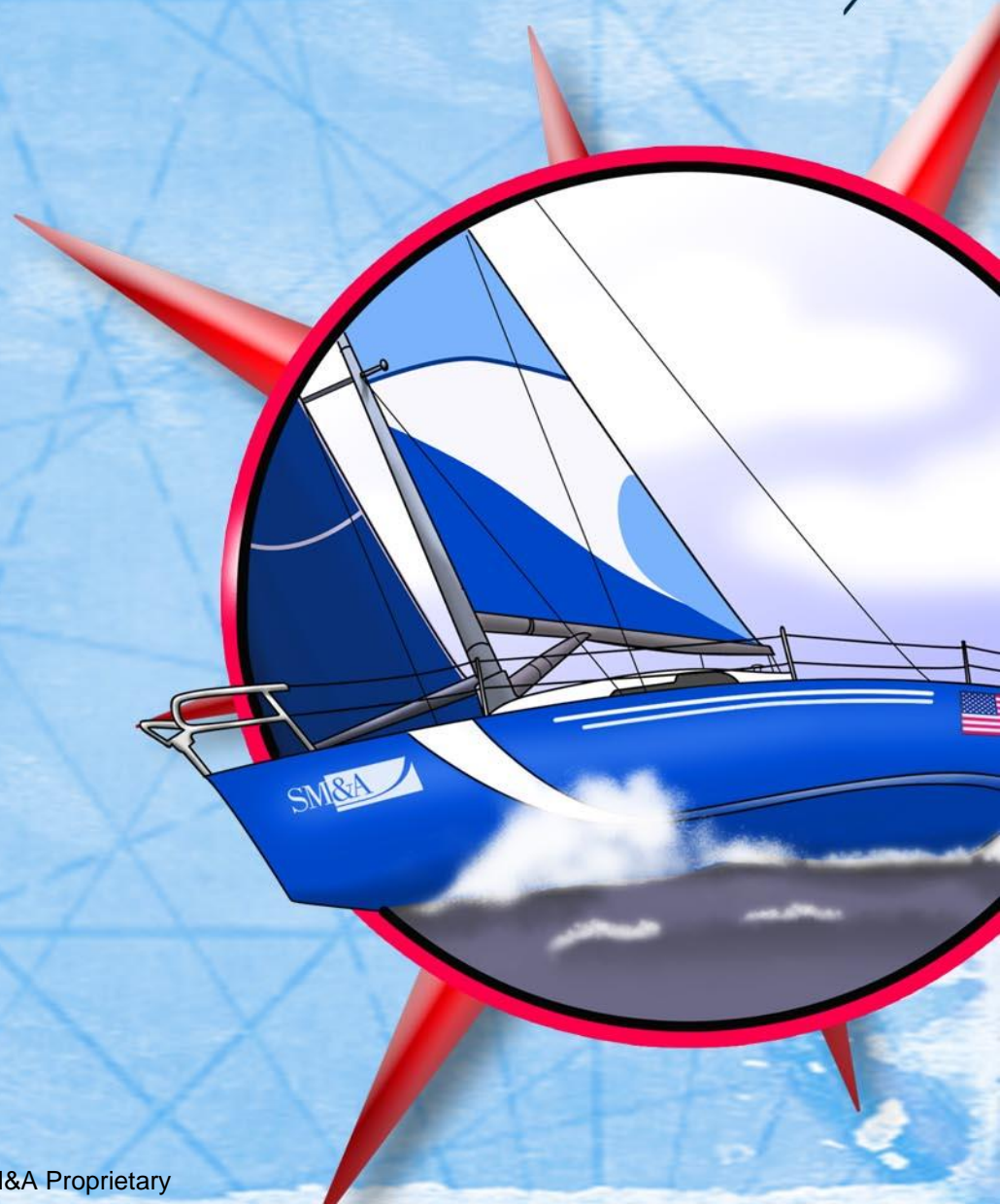


# Lessons Learned

14. Get a “Wall” up first thing, and then walk it – a lot.
15. Art is always the long pole in the tent, do not review and signoff art – delegate
16. Protect the production schedule – make that clear at the very beginning and reinforce it during the entire effort.
17. You are not the Subject Matter Expert (SME) so don't pretend you are one.
18. Trust your crew to do the right thing, and while you are at it, listen to their council.
19. Listen to your client, client team members, and subcontractors.
20. Read the RFI/RFP/RFQ a thousand times, and then read it again.

# *Charting The Course To Quality*

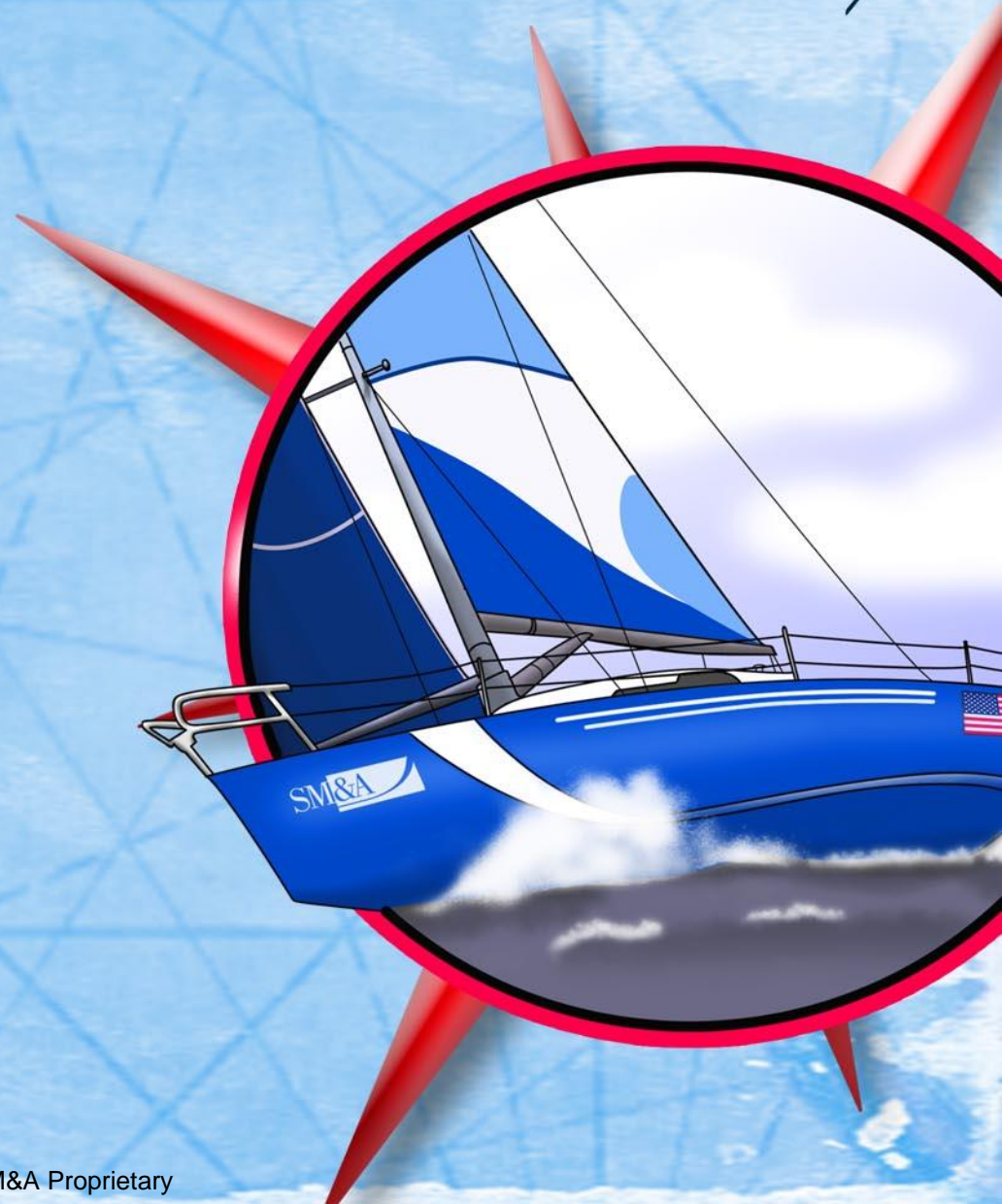
## **Summary**



*Success Makers*

# *Charting The Course To Quality*

## **Evaluation**



# Evaluation Test

- Is this a good management style?



# Evaluation Test

- Is this any way to talk to a Book Boss?



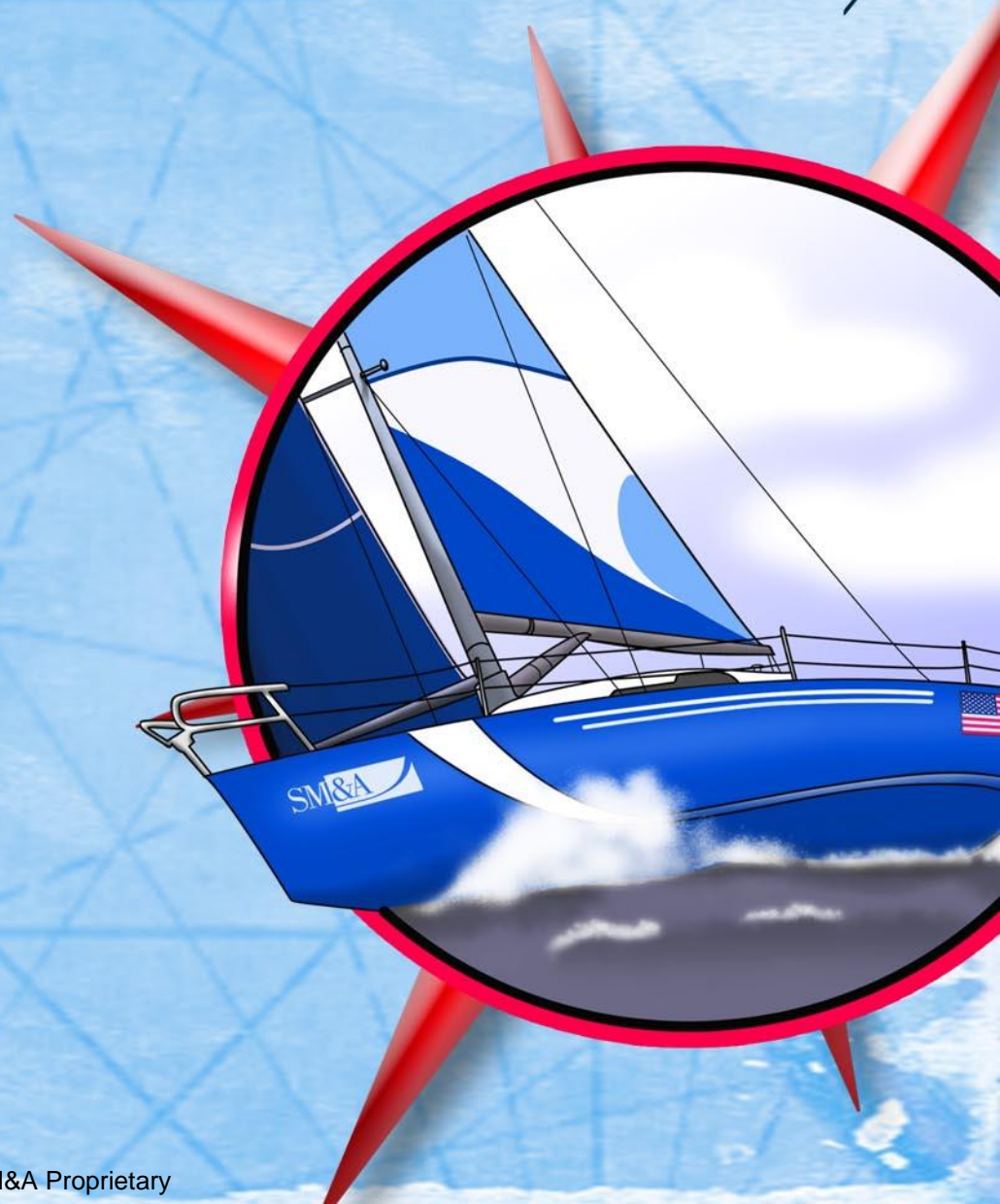
# Evaluation Test

- Can you permit a Book Boss to talk to you like this?



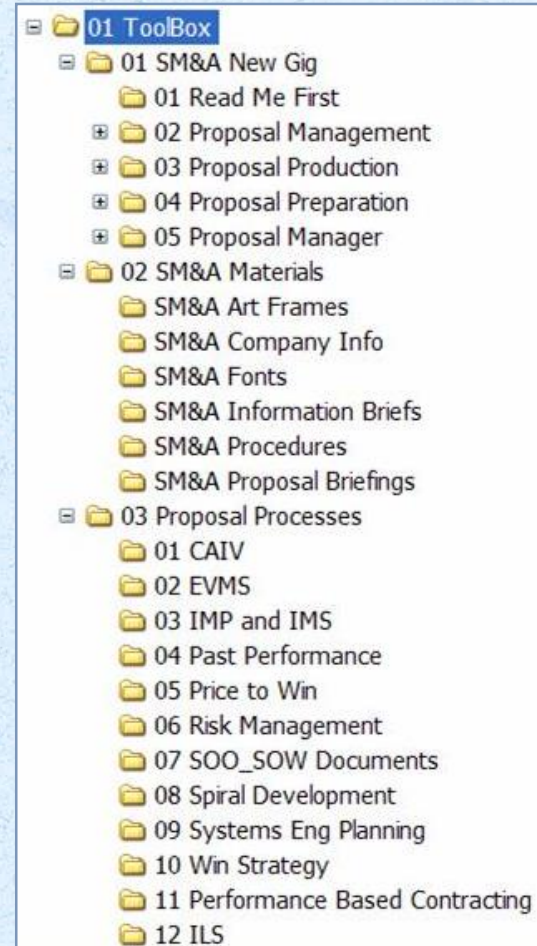
# *Charting The Course To Quality*

## **Take-away Information**



# Handout for Proposal Managers

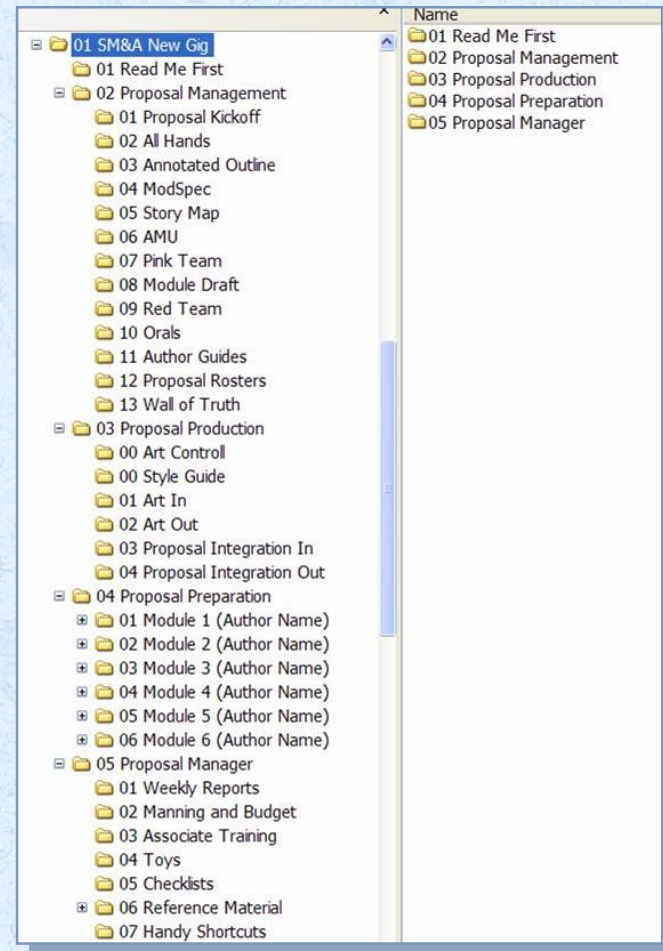
- My “ToolBox”
- A grab and run kit
- It permits me to hit the ground running
- I then tailor the files to the clients proposal





# Handout for Proposal Managers

- **01 SM&A New Gig:**
- **01 The Read Me First**
- **02 The Proposal Management**
- **03 Proposal Production**
- **04 Proposal Preparation**
- **05 Proposal Manager**



# Handout for Proposal Managers

- **01 SM&A New Gig:**
- **02 SM&A Materials:**  
Handy repository of IGH stuff
- **03 Proposal Processes:**  
Grouping of briefing and reference materials what processes do and how they work

