PRIVIA 2020 VIRTUAL USER CONFERENCE

10.15.2020

ATTENDEE

Questions Answered

Thank you for making Privia's 2020 Virtual User Conference such a success! We are overwhelmed by the community response, which includes our highest attendance to date and top marks on content and speakers. A special thanks to all of our generous Speakers for making it an insightful and collaborative day.

Educate, inform, and inspire was the theme, and we hope we addressed your questions and introduced some new, thought-provoking solutions. We invite you to take advantage of the comprehensive post-Conference materials shared on Privia.com, including Session Presentations, Session Videos, and these Attendee Questions Answered, between now and the end of the year.

Keynote: The Secret to Becoming a Highly-Valued Proposal Team
Lisa Rehurek, The RFP Success Company
Learn key strategies you can implement that will increase your perceived value and give you an important seat at the table.

Question: What's the best way to begin to develop my emotional intelligence?

Answer: First thing you have to do is recognize your triggers. I always suggest keeping a journal or a notepad with you, and when you start to notice your emotions, write down what triggered them. Sometimes this requires digging deep and it always requires letting go of ego. Once you recognize your triggers, you can begin to regulate them more.

Question: What if I don't know who would be a good internal advocate?

Answer: Find someone in the organization that has a "seat at the table" or the ears of leadership, that you either already have a relationship with, or can start to build a relationship with. Even if it's someone you don't know, but someone you respect and you feel that you have common values or you admire/respect the way they approach things. Then slowly start to build a relationship with that person. Keep in mind, this is a long-term play, this isn't something that will happen with just one meeting.

Question: How do I best identify someone's communication style?

Answer: You want to identify someone based on a few different factors:

- Are they more people-oriented, or task-oriented?
- Are they fast-paced or slow-paced?
- Are they introverted or extroverted?

To identify these three things, you need to have several interactions with the person, and really pay attention. Observe over some time. Then map to how different they are than you and adapt your communication style accordingly. If you are fast-paced and they are slow-paced, you're going to have to slow down to keep them engaged. If you are people-oriented and they are task-oriented, you need to speak in task language. If they are introverted and you are extroverted, you'll have to give them space to communicate and not railroad over them. (Speaking as a true extrovert who has really had to work hard on this one!).

Keynote: The Secret to Becoming a Highly-Valued Proposal Team, *continued*

Question: What if you can't find an advocate?

Answer: Start with your supervisor. Look at the leadership team. If you truly can't find someone that you would want to build that kind of relationship with, I'd challenge whether this is the appropriate environment for you. Not telling you to jump ship, but you may need to look harder and dig deeper. Get creative with it. At the end of the day, if there truly isn't anyone, you have some hard questions to ask yourself about the fit of the environment.

Question: What if your advocate leaves?

Answer: If you know they are leaving, talk to them about identifying a new advocate before they go. They may be able to "advocate" to that new person on your behalf before they leave. Otherwise, you need to find a new one; refer to #2 above.

Question: What if your advocate leaves?

Answer: If you know they are leaving, talk to them about identifying a new advocate before they go. They may be able to "advocate" to that new person on your behalf before they leave. Otherwise, you need to find a new one; refer to #2 above.

Question: Is there a different approach if I've been here awhile?

Answer: Not necessarily, but you may have tunnel vision. Maybe there's someone internally that you could talk to about a different viewpoint. It doesn't always have to be someone immediately in your area either. Get creative with it.

Introducing Privia Web

Jay McConville, Privia

Get ready for Privia to rock your proposal world with online, real-time, simultaneous Web Commenting - that works with Smart Phones and Tablets.

Question: If someone uses the client application, do you recommend they transition to Privia Web?

Answer: We suggest everyone take a look at Privia Web, and consider the improvements; specifically how Privia Web eliminates the software download to ease maintenance, and how Web Commenting improves the review process. Then let's talk about your upgrade.

Question: Are there things that still require downloads?

Answer: Privia Web eliminates the software download for Contributors, users who typically write and review your proposals. Administrators and Import Toolbar users leverage the Privia Platform to administer the system and import opportunities, which does require the Privia Client software doanload.

Question: Do Privia Web and the client still work on the same computer?

Answer: Yes, however, you won't want to run them at the same time.

Question: Mac and PC?

Answer: Yes, Privia Web is now available for MacOS as well as PC using a browser.

Question: Can I try 5.14 before we upgrade?

Answer: Yes, if you didn't have a chance to participate in the Web Commenting Preview, contact Customer Support to discuss how you can go hands-on.

Question: I'm Cloud - how is the upgrade handled?

Answer: Upgrade services are free for Cloud clients when conducted during Privia's standard business hours. Upgrades take about 2 hours. Contact Customer Support to start planning your upgrade now.

Question: What browsers are supported?

Answer: All Common Browsers; Microsoft Internet Explorer, Microsoft Edge (Chromium), Google Chrome, Mozilla Firefox, Apple Safari.

Sales Strategy Meetings, Not Proposal Kick-off Meetings

David Seibert, Proposal Best Practices

The problem with most proposal kickoff meetings is they're too much about, "how are we going to complete and submit this proposal on time?" but not enough of "How are we going to win this?" Let's discuss.

Question: Dave, you talked about teaching salespeople what you want from these meetings, but obviously, we have no control over them. Can you talk more about this? How it works?

Answer: This is a really good question, and it has a two part answer. First, a salesperson can't give you the information you need if they don't know you need it. If you develop a list of questions that you ask them every single time they bring you an RFP, then over time, they'll learn to be ready with the answers you seek. That's the teaching part.

Second, salespeople need to know what's in it for them, how it's going to benefit them. When one of your salespeople brings you good information about buyers, and you can then use that information to write a better or more compelling answer, make sure you point it out to them. Make sure they understand that the quality information they brought you translated into a better proposal that will increase your odds of winning the business.

Question: You said an RFP is a sales opportunity, not a writing project. But I'm a writer, not a salesperson, and it really is a writing project that we are responsible for completing. I'm not sure I'm comfortable being labeled a "salesperson."

Answer: Yes, you are a writer. That is the talent and skill you bring to the game. But recognize the purpose of your writing is to make a sale. That's why our employers employ us. When I say it's a sales opportunity, not a writing project, I'm trying to emphasize the bigger picture, the larger context in which we're working.

There's an old sales axiom: "Nothing happens until somebody sells something." It's true. You may not want to be a salesperson, or be labeled that way, but you are an integral part of the team that sells things. Selling may not be your job, but it is your mission. This is why, when we sit down to write an answer, it's just not sufficient to write a compliant answer. The reader must understand how our solution solves their central problem, and even more, how we can solve it better than any other vendor they may be considering.

Sales Strategy Meetings, Not Proposal Kick-off Meetings, *continued*

David Seibert, Proposal Best Practices

The problem with most proposal kickoff meetings is they're too much about, "how are we going to complete and submit this proposal on time?" but not enough of "How are we going to win this?" Let's discuss.

Question: As a small business with a small footprint, how do we start selling to new federal agencies before the RFP comes out?

Answer: I wish I could give you a more comprehensive answer here, but this is a small question with a really big answer. A really, really big answer.

There are some consultants who specialize in helping small businesses pursue federal opportunities. I suggest searching for and talking with one of them. They can introduce you to all of the various strategies that should be a part of your market development plan.

Question: How do you recommend overcoming the situation of sales folks who just don't want to do strategy meetings, or who see kick off meetings not as strategy meetings?

Answer: First, I want to direct you to the answer I provided to the first question; you need to teach them what you want and then you have to show them why it benefits them. A combination of education, gentle persuasion, and unrelenting persistence can often convince salespeople why they should work with you.

Second, depending on the situation, you may have to quit the subtle tactics. Sometimes, you have to get an executive or senior manager involved and tell them, "look, we have a way to improve the quality of our proposals and improve sales, but we need your cooperation AND the cooperation of your staff. Do you want to improve our proposals and make more sales or are you happy with things the way they are?"

In other words, start with a carrot, but don't be afraid to reach for a big stick if you have to. In most cases, wiser heads will prevail and they'll recognize the value in your efforts to improve.

Click to Learn More: The Seibert Group

Click to Connect: David Seibert

Pipeline Development, Management, and Optimization

Amber Hart & Lisa Shea Mundt, The Pulse

The amount of GovCon data out there is overwhelming, so how do you prioritize contracts for your pipeline? The Pulse co-founders will walk through how their system Part9 aggregates and disseminates data into custom pipelines.

Question: As a small business with a small footprint, how do we start selling to new federal agencies before the RFP comes out?

Answer: When you're small, you know how important it is to be purposeful with your sales initiatives. It can be hard if you don't have an expansive federal agency footprint, which is why so many people recommend purposeful growth within an existing customer base first (i.e. where you have past performance or existing relationships). When it comes to new agency growth, you need make sure to do your research to exemplify your value. Not every federal customer or agency buys what you are selling so understanding historical spending trends is your fastest avenue to access.

Question: How does Part9 allow you to go beyond "keyword" search?

Answer: Part9 (beta) was developed to be your business development front of funnel. It serves as an interactive search platform that uses custom logic to translate the Government's terms into what you actually need to build, track, and perform due diligence on your pipeline. This translation was developed by actual Government Contracting Business Development professionals, who understand what filtering capabilities industry needs to down select from the tens of thousands of potential Federal opportunities.

Question: How do you keep your pipeline healthy and make sure opportunities are still real?

Answer: Your pipeline should always have a source link for each potential opportunity. Make it a point for someone to check these sources every day and aim to only add a few new opportunities each month (that are within your previously established parameters). If an opportunity ceases to exist or has been stagnant for a while – don't delete it! Rather, move it to another section and track it as –as funny as it sounds—a "pick up line". Even if an opportunity has been put or hold or deactivated, your pipeline should have tracked a point-of-contact. This gives you a great jumping off point which allows you to turn a cold call or email into a lukewarm one. Send an email to follow-up and inquire about the status of that opportunity. This gives you a chance to introduce your organization's capabilities and experience to a person that you know is buying what you are selling.

Pipeline Development, Management, and Optimization, *continued*

Question: What do you do while you wait for pre-solicitation opportunities to become active?

Answer: Sit back and relax. Just kidding! If you're interested in an opportunity you need to watch it like a hawk, but it's not enough to watch just the one posting. Some agencies make it a habit to put out market research under one identification number, and the corresponding final solicitation under a completely different one. Be sure you're pleasantly persistent and keep in touch with the Government point-of-contact on any forecasting or other pre-solicitation notices, join relevant Government sanctioned industry events – even if it's not for that particular bid, and make sure you keep your ear to the ground with industry movements and teaming potential.

Question: How far into the future should your pipeline look?

Answer: This is a matter of preference, size of your company, and your exit strategy (if you have one). Major, more established organizations will have pipelines looking 10-20 years out, but they have the resources to maintain that as well as the lobbyist to help push their agenda on The Hill. If you're a less established organization, you should probably look no farther than 3-5 years out—only longer if you're eyeing a Governmentwide Acquisition Contract (GWAC) where you missed the on-ramp period.

5 Steps to Writing Easy-to-Read Proposal Content

Samantha Enslen, Dragonfly Editorial

"I love reading super-dense copy, written in 10-point type, with 0.5-inch margins, " said NO ONE EVER. Learn 5 quick ways to create proposal content that evaluators read faster, understand better, and remember longer.

Question: Using white space when agencies severely limit proposal page length is a real challenge, especially when their requirements are loaded!

Answer: I couldn't agree more – this can be really challenging. One way to buy more space is to replace wordy business jargon with more concise phrases. For example, replace "in a timely manner" with "promptly"; replace "in the event that" with "if." You can find more examples in our Field Guide to Concise Language.

If you do this rigorously, you'll find that you gain enough space to make even the simplest of changes – like adding space between paragraphs. Remember that any change that adds white space helps your reader. You don't have to create the "perfect document." Make one change that helps. Then, next proposal, see if you can edit more deeply, such as increasing leading (the space between lines), increasing the left margin, or increasing the size of and space above subheads.

Question: How do you make a proposal readable when the funder has released an RFP that asks you to provide a hot mess (repetitive questions, page limitations, etc.)

Answer: Ha – this is a great question, and believe me, I've seen and responded to RFPs like this! I've even had to apologize to our internal reviewers – "I know the structure is weird and repetitive, but trust me, I'm following the RFP!"

Regardless of how weird the structure is, you can still follow basic readability principles like clear heads and subheads to help readers navigate your content and shorter sentences to increase readability. Check out our cheat sheet on readability.

Question: I need to use a lot of technical language in my proposals that necessarily has long words. How do I address that?

Answer: Great question. A lot of our clients work in complex industries like finance, where there's no way to get around using technical language. There's no shorthand for "valuation," for example, or "Relative Volatility (RV) Factors." The best bet is to let this language stand and focus instead on things you can change: shortening sentence length and paragraph length, for example, and increasing white space. You can also focus on replacing non-technical jargon with simpler language. All of these changes will increase readability while allowing you to preserve necessary technical jargon.

5 Steps to Writing Easy-to-Read Proposal Content, *continued*

Question: Does writing for a fifth or seventh grade level "dumb down" my proposals?

Answer: This is a common question. Most people think that copy written a fifth-grade level sounds like an old "Dick and Jane" book. "Dick finds a dog." "Jane hugs the dog." But it doesn't. Complex topics can be conveyed at a fifth-grade level in a way that sounds natural and professional. For example, the paragraph above, and this one, are at a fifth-grade level. How do they sound to you?

Question: My proposals are in Excel, not sure how I can handle the white space advice.

Answer: Great question. Believe it or not, you can apply the exact same principles when creating an Excel proposal. For example, you can still:

- Include headers and subheads
- Add hard returns above headers and between paragraphs
- Use bulleted lists to create easily scannable text

Create shorter rather than longer sentences and paragraphs. All of these techniques work just as well in a table/form field/Excel proposal as they do in a narrative proposal. Here's our cheat sheet, by the way, for creating readable proposal copy.

Question: My evaluators are highly skilled people with advanced degrees. Is this advice relevent to me, if that's my audience?

Answer: I would argue yes, it's even more relevant. Just because someone could force their way through confusing, dense copy, doesn't mean they want to or enjoy doing so. For someone who's a technical professional, it's likely a blessing to be able to read technical content that's actually written in a clear, straightforward manner. They probably don't get that very often!

Question: Why is the advice to have sentences that are 14 words long average?

Answer: An Associated Press study assessed how long readers kept reading, based on sentence length. The study found that people "stuck with sentences" through up to 14 words. After that, they simply stopped reading and jumped to the next sentence. The longer the sentence, the more the readers tended to "opt out."

Also, remember that you're aiming for an average of 14 sentences. That means some can be short, like this one. Some can be even shorter. That allows you to weave in much longer sentences when you need to, like this one. It also creates rhythmic writing with a nice flow.

Top 3 Free and Low-Cost Graphic Tools

Mike Parkinson, Billion Dollar Graphics

Making professional proposal graphics is difficult. It requires money, time and skill that isn't always available. Mike's session helps solve this problem. Here are his top three tools for making bid-winning graphics quickly with little to no money.

Question: Can you please share the name of the 3rd tool again?

Answer: The third tool was Build-a-Graphic (www.build-a-graphic.com). The other two were Pixabay (www.pixabay.com) and Pexels.com (www.pexels.com).

Question: What about copyright issues?

Answer: There are no concerns with copyright issues using these three tools if you do not compete with them (i.e., sell or give away their raw/unedited graphics, videos, or photos as stock images). A best practice is to check the rights of use when using any royalty-free tool.

Question: Can I share graphics I make (using these tools) with others?

Answer: Yes. Attribution is not necessary and is appreciated.

Question: How can I stop my images from being blurry (because of low resolution)?

Answer: When possible use vector images (e.g., svg, emf, wmf, ai, eps), which are resolution independent. Alternatively, use higher resolution raster images (e.g., png, jpg, tif, gif). Raster images are essentially photographs. Pexels, Pixabay, and Build-a-Graphic use vector imagery and/or high-resolution photographs and videos. That means your content remains sharp, clean and professional.

Click to Learn More: Billion Dollar Graphics

Click to Connect: Mike Parkinson

Streamline Repetitive Proposal Document Creation

NiKole Maxwell, Privia

Who wants to create a proposal resume or past performance from scratch? See how life cycle automation makes re-purposing repetitive documents faster and easier to search, select, order, and format for every proposal.

Question: How do you present your company with a collective group of individuals with certain skill sets without company past performance?

Answer: Start by leading with your combined individual past performance qualifications. Augment that with recommendations and past client surveys. Seek to be a sub rather than a prime to gain the past performance experience you need to get ahead. And establish a plan to organize and maintain that past performance detail as it grows before you and your team get too busy!

Question: Can employees have multiple resumes, designed for custom presentation? Or is the custom resume generated each time? Are the selection templates retained and stored or do you redo for each need, based on all the data stored in the database?

Answer: All of the data is turned into template tags. Those tags are placed anywhere within a Word document, allowing you to create a more custom template for submission each time. The templates are registered and stored. Administrative team members will have the ability to select them for reuse rather than creating a new one.

Question: Can you change drop-downs? Customize what kind of drop-down?

Answer: The standard configuration of Resume Manager does offer some flexibility in changing drop-down values. We offer a premium configuration option that allows for the configuration of all resume attributes and values.

Question: Can we bulk load all of our existing resumes?

Answer: Yes, our bulk upload option allows up to 20 resumes at the same time via an SFTP or drag and drop upload option. This can be used repeatedly at a set interval to allow for the upload of your entire organization userbase if needed.

Question: Can we change the document after it's been created?

Answer: The documents are generated in Microsoft Word. They may be exported/downloaded and edited in Word directly, as if generated in the system.

Question: Does it share the resulting resume with Privia?

Answer: Yes and no. We offer an optional integration with Privia for storing resumes in a Workspace. But a Privia subscription is not required for a Resume Manager. And resumes or resume details are not shared with Privia (the company) at any point in time beyond requested or required maintenance and support.

Click to Learn More: Privia

Click to Connect: NiKole Maxwell

Competitive Insight for Effective Proposal Development

Matt Pinkston, Technomile

If you don't know what your business competitors are doing, you're only fighting half the battle. That's where competitor insight come in. Matt will discuss why competitive Insights are an important piece to proposal development.

Question: Is the Technomile competitive insights tool the one called "Technomile Analytics"? Does your firm give courses on how to most effectively use this product for Black Hat sessions?

Answer: Yes the technomile analytics product is being rebranded as competitive insights. We work with all our clients and potential clients regarding training needs, one of our most popular training sessions is one where we as our client what their use cases are and provide custom tailored education based on their needs. We have done how to use competitive insights for black hats many times.

Click to Learn More: Technomile

Click to Connect: Matt Pinkston

What Proposal Evaluators (Really) Want

Johnna Rogers, COO, Wake County, NC

Join Johnna Rogers, Chief Operating Officer at Wake County, NC, as we take time to breathe with an insiders look at what proposal evaluators are (really) looking for. What follows is a sample of questions Johnna addressed during the interview. See the Session Video for more.

Question: What's the proportion of public records requests you get on an annual basis? Do you redact any of the information?

Answer: Assuming the question relates to public requests for RFP information. Public records requests range from ten to twenty percent of RFPs issued. They are most frequently requested on large dollars contracts. We never respond to requests about a specific RFP until completing the process and awarding a contract. Very few RFP items are subject to redaction. We include a statement in most RFPs that submittals are subject to public record requests.

Question: What do you think about marketing material like datasheets?

Answer: Marketing materials may be useful if they provide sufficient details and are relevant to something specific in the RFP.

Question: Does a compliance matrix really help you in the evaluation process?

Answer: A matrix is quite useful in the evaluation process. The benefits are:

1. Provides a straightforward, easy to follow checklist on the most essential evaluation criteria aligned to specific sections of the RFP;
2. Supports consistency across multiple reviewers and scoring norming and is easy for reviewers to use as they review and compare various components;
3. Makes the subjective more objective by having a pre-defined structure; and
4. Ensures adequate and appropriate documentation of the process.

The matrix should include the must-have “Yes/No” requirements. If the proposal doesn't get a “Yes” on those components, no further review is necessary. This helps to weed out proposers who don't follow instructions and don't warrant consideration.

Question: If the evaluator is not a decision maker, do they need to justify their evaluation?

Answer: Yes, as the decision-makers will want to understand the thought processes beyond the evaluators and how they arrived at the selected vendor and understand the different perspectives, especially if the vendor selected was not unanimous.

What Proposal Evaluators (Really) Want, continued

Question: How many gatekeepers does the proposal pass through?

Answer: This will vary from entity to entity and even within an organization, but at a minimum you have the have the responsible party and purchasing department – those are the two primary gatekeepers with the responsible party developing the scope, requirements, the RFP itself. Within the responsible party you will have the proposal team that typically includes subject matter experts, the recommenders and the decision-makers. Most often, the recommenders and decision-makers are the same, but in some cases, you may have the proposal team making the final decision or it may have to go a chief executive or a board for final vetting and approval.

Question: The evaluation criteria are typically high-level (x% for process, x% or capability, x% for budget, etc.). Is there a more granular evaluation behind that?

Answer: Yes, that would describe how the overall score is achieved, but there is typically more detailed criterion within those categories that are considered for determining the scores for each component. The details below this level could range from a general scoring of the section with 1 being Poor to 4 being Outstanding.

Question: Is it really all about price?

Answer: For some people, but not for me – I look to who is the most responsible and responsive bidder - - who can best meet our needs and select a vendor first on qualifications and then consider price. And because getting the best vendor is such a high priority, for any RFP in which I am involved, proposers are required to submit pricing separately and the pricing is not shared with the evaluators and the pricing isn't open until we have short-listed the proposals for in-persons interviews. We open the pricing then to determine if pricing is in the expected ballpark and if there are any issues that stand out that might require follow-up with the vendor.

Question: Can you recognize boilerplate?

Answer: Yes, when the proposal doesn't answer the specific questions asked in the RPF. And definitely when the proposer fails to change the names in the proposals. I can't tell you the times I received a proposal that said the "County of Somewhere" else or even better, the "City of." This causes the reviewers to question the vendor's real interest in the business and their attention to detail. I think of one time in my career where the wrong name was included that the proposal actually was considered beyond the first round. And in that instance, the rest of the proposal was so strong, you had to look past the mistake. We all make them from time to time.

Tips and Tricks for Improving the Review Process

Cheryl Smith, Privia

How you manage your proposal reviews will determine how you spend your proposal time budget. Here are three things you can do right now for faster, more productive reviews that will cut your review time spend in half - and deliver the feedback your team needs to strengthen your proposal.

Question: What does "hot wash" mean?

Answer: The term “hot wash” comes from the U.S. Army: the immediate "after-action" discussions and evaluations of an agency's performance following an exercise, training session, or major event. In the proposal industry, a “hot wash,” or debrief, allows the proposal manager to evaluate, clarify, and prioritize exactly what feedback is incorporated into your proposal before the team takes action.

Question: From a practical perspective, do you do hot washing for every proposal?

Answer: It depends on your reviewers. If they are consistently providing comments like “this is weak” or this needs more,” then yes. Weak or conflicting comments leave the team asking, “Ok, thanks, but, now what?” And that can quickly eat up your writing and revising time. As a proposal manager you want to help experts and writers use their time more wisely, and “hot washing,” can help, especially when you save time by centralizing the review process and sort and filter comments before the writing team takes action. As you educate your reviewers on their role, you should find the need to “hot wash” decrease, so you can pick and choose when to “hot wash.” For example, on more strategic bids, later in the review cycle, or when time to revise is at a premium and you want to quickly ferret out weak or conflicting comments or comments that are not in compliance.

Question: How do you recommend overcoming the situation of reviewers who just don't follow the instructions - either they don't address what you asked them to, or they give lots of unhelpful feedback?

Answer: I’ll take a page from David Seibert here, on advice from Carl Dickson, founder of PropLIBRARY. Instead of asking for feedback, which can lead to comments like “this is weak” or “this needs more,” ask for instructions. When you ask a more specific question like, “how can I improve this section,” you’ll find you get a more specific comment, like, “add this benefit to strengthen the story.” At the same time, it’s important to educate your reviewers, so they understand why their role is so important to the process; reviewers are your gate keepers. They provide guidance on compliant issues and strategy weaknesses that guide your team through revisions and strengthen your proposal. Review sessions should be an iterative process, tweaking, improving and sharpening your proposal with each cycle.

Tips and Tricks for Improving the Review Process, *continued*

Question: I see you can capture concurrent comments. Can you get concurrent edits?

Answer: Privia takes a “curated commenting” approach to reviews, meaning, comments are made synchronously or asynchronously on a document without impacting the original document version content. This gives the editing author control over what comments are incorporated into the next version, without impacting compliance or formatting. Authoring editors can also copy and paste comments to save time when lengthy comments are provided.

Question: Can you modify the drop down menus for what you want to look for?
Answer: Yes, the drop-down options for both the Assignment field (comment category) and Status (what happened to the comment) can be modified to reflect your review process.

Question: Can we have more than one reviewer?

Answer: Yes, with Privia multiple reviewers review together at the same time, anytime, anywhere. They comment and reply and come to consensus together. For example, when one reviewer comments, the other reviewers reviewing at the same time will see the comment, and can reply, and vice verse. If reviewers are reviewing asynchronously, they will see all of the comments that have come before then so they can reply and build off of each other’s feedback.

Question: Where do the comments go?

Answer: All comments live with the document version, and remain available for review in the Commenting tool. For example, if you’re reviewing version five, you’ll see version fives comments. If you toggle to version four, you’ll see version four’s comments.

Question: Do the writers use this to see and incorporate comments?

Answer: Yes, "hot washing" helps writers save time by focusing on the specific comment category(s) defined by the proposal manager. Both the proposal manager and the writers can use the Comment Sort and Filter feature to quickly find and incorporate comments and set the appropriate "Status" for each.

Question: Can you copy and paste from the comments?

Answer: Yes, writers can copy content from a Comment or Reply and paste it into the document they are revising, for example, when the reviewer provides new content.

Question: Can reviewers see what happened to their comments?

Answer: Yes. By having the writer set the appropriate "Status" when they are done, reviewers can see what happened to their comments using the Commenting tool.

Map and Automate an Efficient Proposal Process

Richard Whiteoak, Privia

When you add workflow to your proposal process, you save time by automating many of tasks, such as reminders that drive deadlines and forwarding tasks for review or approval. Learn how to map your process to workflow and save time.

Question: Is there a limit to the number of workflows?

Answer: No, you can have as many workflow templates as you need. However, only one workflow can be used at a time

Question: Can Privia automatically forward a task for review and/or approval from one person to the next person based on workflow?

Answer: For task approval/review, yes, we have a mechanism for that. Tasks are assigned to a member of the team are called the Accountable in Privia. That is the person who must do the work. Then once the task is complete it can be assigned to an Acceptor who can review the work and determine if its sufficient to move on to the next text. Accountables and Acceptors are standard features with workflow.

Question: Can you report on the workflow activity?
Answer: Yes, you can generate Reports in Privia to get a snapshot view of proposals that are inflight to give a view of them across the Privia ecosystem.

Question: Are we locked into a workflow once we select it at launch - or can we change it on the fly?

Answer: You can change it, but it requires that you roll the Opportunity back to your pipeline and then relauch it with a different workflow. The Rollback process will delete any folder and their content in the process so use with caution.

Question: What's the difference between workflow and rules?

Answer: Workflows are specific to a proposal effort, include a sequence of steps ordered by your proposal schedule, and deal with tasks assigned to your team. For example, you could have a task that is part of a workflow that says "Proposal Manager - Generate an Opportunity status report and send a copy to the leadership team" at a specific time in your process.

Rules are more generic to the Privia ecosystem. For example, instead of a workflow task, you could set-up a Rule to say, "Proposal Manager - Generate an Opportunity status report and send a copy to the leadership team on the 1st and 15th of each month."

In the Workflow, the task is in a chronological order according to your process. With the Rule, the task is triggered based on the calendar.

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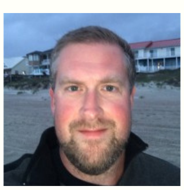
Thank you!

Thanks again for joining us - we couldn't have done it without you!

Find your Session Presentations and Videos **here**, and follow us on LinkedIn for updates. We look forward to learning more about you and your proposal goals!

Until then, keep calm and proposal on!



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Miss my express demo? **Schedule** one today!