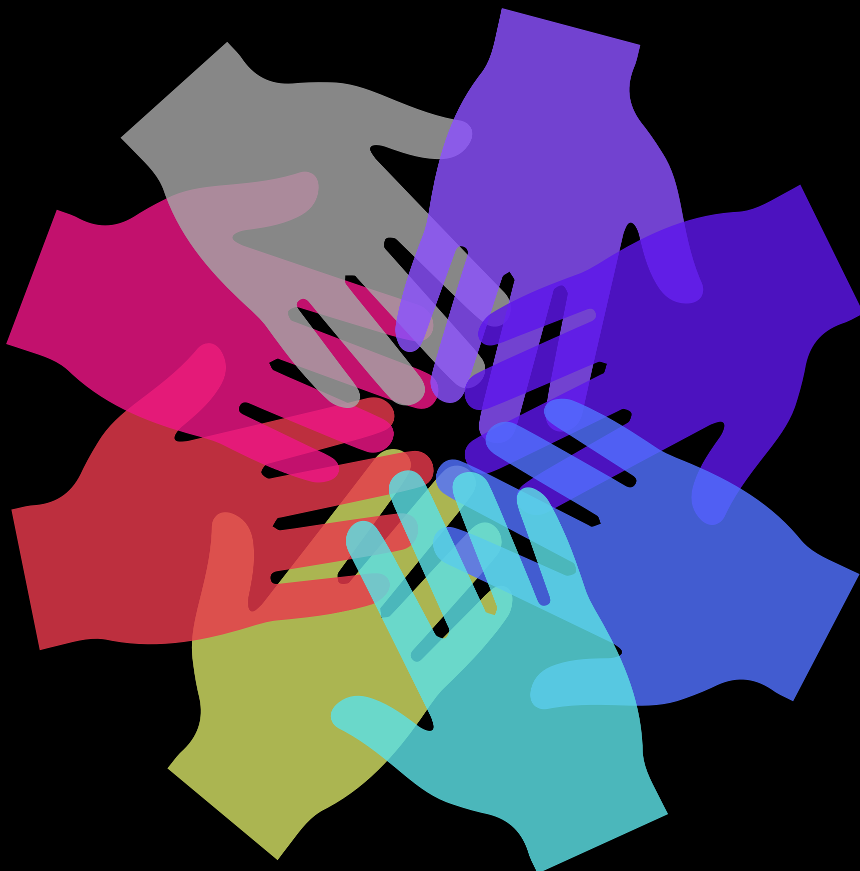
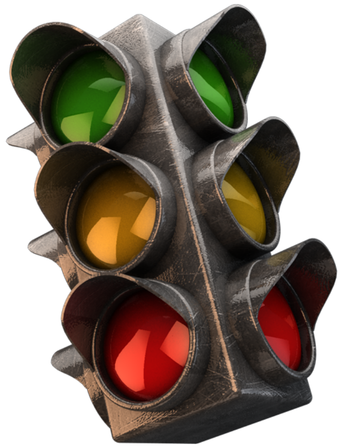
Proposal Management eBook

What is Proposal Management?



Proposal management is the best practice process of leading a team through the written portion of the sales cycle.

INTERSECTION: BUSINESS DEVELOPMENT & PROPOSAL TEAM



Proposal management is the best practice process of leading a team through the written portion of the sales cycle. Throughout, there are experts to wrangle and tasks and schedules to monitor. There is content to find, write, and tailor to customer goals. There are review cycles to referee, version control to worry about, and a relentless commitment to compliance and quality required; all despite a geographically diverse team's shifting priorities.

Crafting a winning proposal is a time-consuming business investment. Thankfully there are many best practice approaches that can make winning a reality. Whatever approach you define, success requires collaboration. Collaboration promotes a team conversation with a center, rather than from all sides, so that everyone is on the same page. It aligns capture strategy with writing execution to reduce revision cycles. It drives consensus so the team focuses on advancing proposal quality given the time available.

Where Business Development Meets Proposal Team

Collaboration typically begins where the business development and proposal management team meet in the sales cycle; qualifying an opportunity. We like to think of this step as the Intersection: where the team shares opportunity information, asks solution and strategy questions, agrees to invest in the bid, and outlines the capture strategy.

Experience demonstrates that the more collaborative this Intersection is, the more time your team will save to invest in proposal quality.

How to Achieve Collaborative Intersection

Proposals are persuasive documents; structured logical written arguments that lay out everything in favor of your solution. The information gathered during Intersection is the key to writing persuasively; customer needs and goals, how you'll address them, how you'll position your solution and its benefits and the proof you'll use to demonstrate your experience. Effective Intersection collaboration defines these details for the team up front, so they can write quickly and persuasively.

There are three simple process changes you can make to achieve a collaborative Intersection. The key is to begin early, even as soon as the opportunity is a mere twinkle in your sales representative's eye.

#1 Gain an Early Advantage

As much of a “killer-app” email is, it is not well suited for collaboration; lengthy text, convoluted threads, and the “back-and-forth” effect can leave your team confused and frustrated, or worse, turning to a different task. Instead of sending another email, publish opportunity details in a secure, central location. Centralizing this collaboration, from pre-sales to RFP to capture strategy, provides your team with easy access to the details they need to make the bid decision, define the capture strategy and write to that strategy.

#2 Engage in Questions, Capture Answers

There are lots of things to consider when qualifying a bid. What are the customer’s pains and goals? How will our solution address them? What proofs do we have that we can do the work? Is the RFP hard-wired for someone else? Answers to these types of questions help the team “face the facts” about the bid so you’re not tilting at windmills. Automatically capturing these types of questions and answers means experts won’t be recreating the wheel when the questions come up again with capture strategy and writing to the capture strategy.

#3 Collaborate on Capture Strategy

A capture strategy defines how you will close the sale. It is developed as the team goes through the process of qualifying the bid. Centralizing this collaboration invites the team to react, ask questions, discuss details, and come to a clear understanding of how they’ll capture the opportunity with their written proposal.

By harnessing the collaborative energy of your team during the Intersection of business development and proposal team, you’ll move quickly, remain agile, make better investment decisions, and focus on quality. By centralizing Intersection collaboration, you’ll make proposal development faster and easier.

Read on for the second Blog of this four-part series focused on cultivating team collaboration to reduce time and increase proposal quality.

Proposal management is the best practice process of leading a team through the written portion of the sales cycle. Unfortunately, the people who comprise this team already have full-time jobs. They are individuals, drawn from across the organization, working together for a period of time. For the organization hoping to produce a compliant, quality proposal to close the sale, this presents a business challenge; how does everyone work together toward the common goal despite a geographically diverse team's shifting priorities?

Whatever your proposal management process, an productive team requires effective team collaboration to be successful; it aligns capture strategy with writing execution to reduce revisions, it drives review consensus to advance quality, it empowers innovation and problem-solving, and it ensures everyone, no matter where or when they work, is on the same page.

What is Effective Proposal Team Collaboration?

An effective proposal team collaboration is distinct from one-way communication exchanges, such as with email, in that it promotes a conversation with a center, rather than from all sides. Proposal team collaboration typically begins where the business development and proposal management team meet in the sales cycle; qualifying an opportunity. We described this Intersection in the first Blog of this series.

Where the rubber hits the road, however, is when the team starts writing. We like to think of this step as the Interplay: where each contributor has an effect on the other, greater than the sum of their parts. Together, their understanding of the customer, the opportunity, and the solution come to light in the written phase of the sales cycle, the proposal.

How to Achieve Collaborative Interplay

Here we'll break down the effective proposal team collaborations necessary throughout the proposal writing process to avoid the miscommunication that disrupts the schedule and the conflicting points of view that derail reviews. There are three key collaborations that drive productive Interplay. The key is to give each collaboration the tools they need to be successful.

Proposal Manager and Proposal Team

A productive team Interplay begins with the proposal manager. The team may rely on business development for strategy, but they look to the proposal manager for leadership and advice on how to write the proposal.

No one wants to search email for the current version of the proposal outline, strategy details, and their assignments and tasks. Centralized access eliminates the search, and delays, that come with email. Information is current and people are more likely to collaborate when they understand how each task depends on another. How delays impact milestones, despite shifting priorities.

No one wants to start from a blank page. Providing browse and search access to submitted proposals, as well as appropriate boilerplate and templates, helps teams pull together a first draft more quickly, and focus on what they do best; collaborate, innovate, and write.

Proposal writing is difficult. Helpful tools and thoughtful communication will empower your team and ultimately lead to more quality proposals.

Contributors (Writers and Experts)

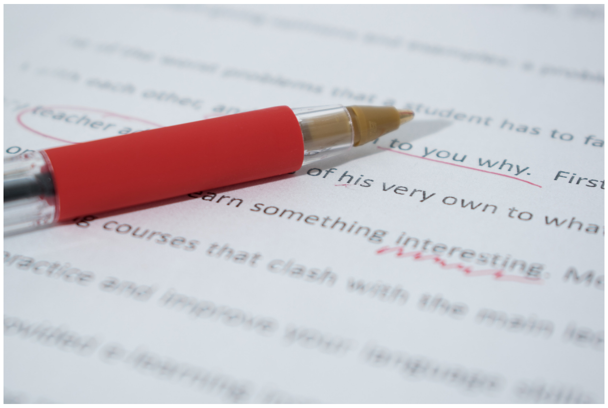
Experience shows that the more efficient the proposal process, the more time saved to focus on writing. The same is true for peer-to-peer Interplay; the more effective the team's collaboration the more time saved to focus on the quality that makes your proposal stand-out.

Reusable content may help the team get to a first draft faster. When it's not tailored to the specific customer, however, you send a dangerous message; your project is not important enough for us to write a proposal that is specific to your needs. So, let's pick up where the reusable content left off; you have some of the answers to the questions and now you need to tap into the team to fill the gaps, correct the inaccuracies, meet compliance, tailor, and prepare for review.

By centralizing proposal development, experts discuss details together online and capture the results for reuse. Best of all, using these tools you can reach everyone in your organization exactly when you need them, leveraging their expertise more efficiently for the task at hand.

By harnessing the team's Interplay collaboration, you'll make proposal development faster and easier and set the groundwork for faster, more productive reviews.

Read on for the third Blog of this four-part series focused on cultivating proposal review collaboration to reduce time and increase proposal quality.



Proposal management is the best practice process of leading a team through the written portion of the sales cycle. As the team writes, proposal reviews are a critical step in this process. It is here where reviewer reactions and insights advance proposal maturity and quality; where a choppy narrative becomes engaging, where more concise language builds credibility, and where added details drive a deeper understanding of the solution for a more lasting impression. It may take multiple reviews to improve proposal maturity and quality. How well proposal reviews are managed will determine how far the team can go toward strengthening proposal quality to improve win probability.

Collaboration for Faster, More Productive Reviews

Proposal collaboration typically begins at the Intersection of business development and proposal management; qualifying an opportunity. Where the rubber hits the road, however, is the collaborative team Interplay necessary to bring the organization's understanding of an opportunity to light in the written proposal.

Where the team goes from here will determine how well the proposal resonates with evaluators. We like to think of this step as the Inspection; where reviewers identify compliance, solution and strategy issues, provide feedback and instruction, and address scoring goals.

How to Achieve Collaborative Inspection

Email out four review copies, and the odds are three copies will be returned. The odds are also that at least one will be a review of an older document version. There will be some helpful feedback, but some of it will be redundant and some of it will be ineffective, like, "this needs more". Experience demonstrates that the more collaborative the review Inspection, the more fruitful the review and the more productive the revision.

There are four simple process changes you can make to achieve a collaborative review Inspection. The key is to give the reviewers what they need to be insightful and precise.

- **Ask for Instructions.** This is a best practice first brought to light by Carl Dickson over at PropLIBRARY, and further explored in David Seibert's insightful book, Proposal Best Practices: A Practical Guide to Improve Your Win Rate When Responding to RFPs. Not Feedback. Improve time spent in review by asking for specific instructions instead of generic feedback. This small adjustment in mind-set will transform a "this is weak" comment into an "add this proof point to strengthen the section" instruction. Make sure your reviewers understand how each review builds on the last – incrementally improving win probability – and how their reviews are the roadmap that helps the team get there.

- **Use Reviewer Time Wisely.** If the review date arrives and the proposal is not ready, full of gaps and inaccuracies and boilerplate, it's time to reschedule. When it is time to review, swap the frustrating email search for a centralized review. Reviewers will save time with direct access to the current version of the document. They'll have visibility into what other reviewers are suggesting, eliminating redundant instructions. They'll have access to previous reviews for context and deliver more thoughtful instructions. Add smart phone and tablet access and on-the-go reviewers will never miss a review again.

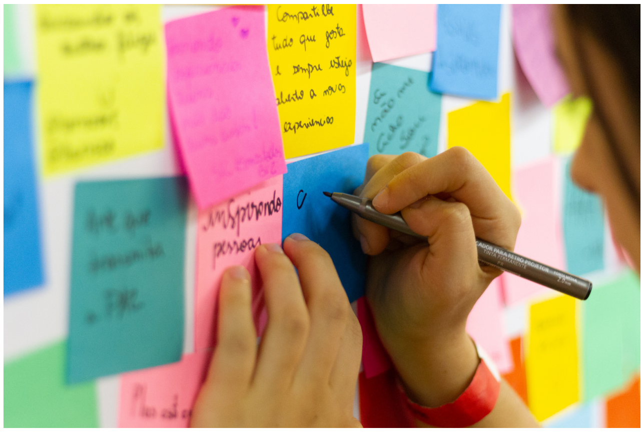
- **Proposal Reviews are All about Consensus**; identifying and agreeing on what needs to be fixed and what needs to be strengthened in the proposal. When reviewers have collaborative access to each other's work real-time, they can build on ideas, discuss differing opinions, and come to consensus during the review. Proposal managers spend less time clarifying weak comments and mediating differing opinions, and the team spends more time on revisions that improve quality.

- **What's a Review "Hot Wash"?** When review instructions are in conflict, a debrief, or "hot wash," clarifies and prioritizes what to incorporate into the proposal. By centralizing reviews, proposal managers, section leads, and book bosses have a single point of access to evaluate all review instructions in context. They sort and filter and quickly identify where the conflicts are and where clarification is needed, minimizing confusion among the team during the revision.

By harnessing collaborative team Inspection, teams make reviews faster and more productive, and deliver a clear roadmap for impactful revisions that advance proposal quality and win probability.

Read on for the fourth Blog in this four-part series focused on cultivating post-review revision collaboration to reduce time and improve proposal quality.

IMPROVEMENT: POST-REVIEW REVISIONS



Proposal management is the best practice process of leading a team through the written portion of the sales cycle. Proposal writing is a form of persuasive writing, designed to convince the evaluator that the business has the best resources and skills necessary to deliver on goals. How well the team leverages reviewer reactions and insights during the revision cycle determines how well the proposal resonates with evaluators.

Post-Review Revision Collaboration

Proposal collaboration typically begins at the Intersection of business development and proposal management; qualifying an opportunity. Through writing Interplay, the team brings the capture strategy to life in the proposal. Review, or Inspection, provides feedback and instruction for improving proposal quality.

Where the team goes from here will determine how well the proposal reads in favor of the solution. We like to think of this step as Improvement; where the team leverages reviewer reactions and insights to refine content to better engage and convince evaluators.

How to Achieve Collaborative Post-Review Revisions

Revisions are typically a crossroads for the proposal team; time is of the essence and the course of action chosen will significantly affect the proposal's win probability. Experience demonstrates that the more collaborative this Improvement phase, the more productive the revisions.

There are three simple process changes you can make to achieve a collaborative post-review Improvement. The key is to give the team a clear revision roadmap to maximize their time, complete with detailed instructions for tailoring content and proven tools for writing persuasively.

Get the Upper Hand on Revision Chaos

When review team feedback and instruction are in conflict or non-compliant, the team can be left wondering how to begin. A review "hot wash," or debrief, provides the proposal manager with an opportunity to evaluate and prioritize exactly what should be incorporated into the proposal before revisions begin. This provides the team with a clear roadmap that focuses revisions and saves valuable Improvement time.

Define the Writing Strategy

Proposal writing is a team sport, drawing on experts from across the organization, all with their own opinions and shifting priorities. To bring greater continuity to the narrative during revisions, gather and revisit the proposal outline and scoring criteria for each section. Ask questions and agree on overall proposition, style, voice, word choice, and quantitative details. Break down the high-level scoring categories into relevant questions raised in the evaluator's mind as they read. Answer each relevant question as part of the revision, breaking down the answers into simple steps and terms.

Tailor Content for Quality.

At review time, the proposal may be informative rather than persuasive. It may read choppy or feel cobbled together. It may be lacking in details or fraught with confusing technical jargon. It may be reusable content or boilerplate. All things that make evaluators feel their project was not important enough for you to write a proposal that is specific to their needs.

A quality proposal communicates a clear, compelling message about the business, the solution, and the people, helping the evaluator reach the desired conclusion. Teams do this by understanding the client, getting inside the mind of the evaluator, and leveraging proven persuasive writing techniques:

- **Focus on intent** and the details that will help evaluators understand, and accept, the solution at a deeper level. Begin with an exercise in empathy; consider what the evaluator wants to hear and the questions raised in their mind as they read. Revise with answers to those questions to further the evaluator's understanding and acceptance.
- **Focus on the "how to do"** aspect of the solution. Revise and make more relevant by showing evaluators how their success will be achieved. Break down large blocks of text into simple steps, and infuse each with relevant client stories to establish you as a confident, authoritative source.
- **Cut the fluff** of filler words and phrases like basically, exactly, actually, in general, and in order to, etc. These words make the proposal sound uncertain, undermining evaluator confidence. Revise with stronger, more concise words and phrases that more clearly convey your intent. This will better hold the evaluator's attention and keep them from skimming.
- **Take time to explain the technical**. Technical sections must demonstrate proficiency, explain in a way that is understandable for varying levels of competence, and provide everything in context to the overall solution and evaluator goals. Revise by breaking down longer paragraphs into shorter paragraphs and breaking down longer sentences into shorter sentences. Use bulleted lists and graphics. Use simpler language, avoid jargon, and define unfamiliar or complex terms. Remember, the proposal is telling a story, not instructing a user.

- **Hook Readers**. There are only a few seconds to capture the evaluator's attention, so don't confuse them with "throat-clearing" or insider language. Revise relevant sections to begin with a fact or finding that explicitly supports the proposition. Consider a relevant headline to organize paragraphs. This will help draw the evaluator in, clue them in to what you're talking about, and help them better follow your line of thinking, i.e., the narrative.
- **Repeat Yourself**. Proposals can be hundreds (and sometimes hundreds and hundreds) of pages. Strategic repetition is an effective way to gradually remind evaluators of the proposition. Revise by rephrasing the same point, swapping in a client story or quote, and adding a visual to reinforce your point. Remember, not all evaluators read the proposal from front to back; whether they open it at the executive summary or the technical overview, they should be able to quickly pickup on the narrative and understand the proposition.

By harnessing collaborative Improvement, proposal teams save time; time they can invest in the writing that improves win probability, or, the proposal maturity and quality evaluators want to read, understand, accept, and defend.

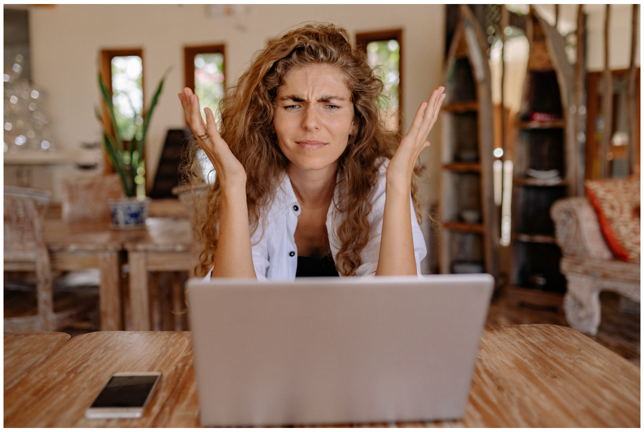
In Conclusion

Proposal management is hard work. Between the bid decision and the submission there are experts and opportunity details to wrangle. There is content to find, tailor and write to compliance. There are reviews to referee, feedback and instructions to clarify and prioritize, and revisions to improve quality.

How well you manage and empower a geographically diverse team's collaboration, despite their shifting priorities, will determine your success.

Privia makes managing large, complex, high-quality proposals faster and easier.

BONUS: WHAT YOUR PROPOSAL MAY BE TELLING EVALUATORS ABOUT YOU



A quality proposal is the ultimate sales document; it gets inside the mind of the evaluator, makes it easy for them to reach the desired conclusions, and communicates a clear message about you and your business. Send the right message, and you build confidence and trust with evaluators. Inadvertently send the wrong message and you undermine your sales effort.

Your proposal says a lot about you. Here are three common writing issues that can hurt your team and how to avoid them.

You're Not Tailoring Reusable Content

Reusable content helps teams get to a first draft faster and easier. But when your proposal narrative feels "cobbled" together from different sources, evaluators begin to question your attention to detail. And when your proposal doesn't speak to their specific needs, evaluators begin to question your real interest in their business.

Message: *Your project is not important enough for us to write a proposal that is specific to your needs.*

Trying to engage an evaluator based on a proposal that is in-part written to someone else's needs is like trying to force a square pen into a round hold. It just doesn't fit.

So, you have your first draft. Where you go from here will determine how well your proposal resonates with evaluators. Review and revise your proposal to include the "what's in it for me" aspect of your solution. Stakeholders have a lot at stake; these details will erase the taint of reusable content, engage evaluators, and build credibility.

You Don't Really Empathize with our Problem

Remember, not all evaluators are decision makers. Some are the technical experts and functional workers who will work with you and use your solution. When your proposal is not relevant, showing evaluators you understand what they need, they will question your project fit. And when your proposal is not relatable, showing evaluators you understand why they need it, they will struggle to influence the buying decision.

Message*: Your project is not important enough for us to write a proposal that helps you understand and accept our solution at a deeper level.*

Putting the client at the heart of your proposal is a best practice. It drives persuasive, engaging content that differentiates you from the competition. But just talking about the client is not enough.

You care about your client's needs. Review and revise your narrative (introductions and requirement response) to lead with specific client needs. Then, before you start talking about your solution, follow that with why the client is having the issues, concerns you have identified, and factors for success.

Details demonstrate empathy, and the level of commitment and dedication necessary for a lasting impression and a successful long-term partnership.

You Didn't Really Think About Scoring Criteria

Evaluation criteria typically involves high-level scoring categories. For evaluators, however, there's more to these scoring categories than meets the eye. According to Johnna Rogers, COO of Wake County, NC, these scoring categories are typically broken down into more detailed criterion. When your proposal doesn't consider these detailed criterion, evaluators struggle with the details they need to defend their score to decision makers.

***Message**: Your project is not important enough for us to write a proposal you want to read and defend.*

Writing to the scoring criteria is a best practice. It helps you focus the team on what's important, and helps the team write for the top score. Unfortunately, it's the criterion below these high-level scoring categories that determines the final score. So, you've written to the scoring criteria. Now, review and revise your proposal:

- Break down high-level scoring categories into relevant questions you might raise in the evaluator's mind as they read.
- Answer each relevant question.
- Break down answers into simple steps and terms.

Stakeholders are keeping score. Review and revise your proposal with the details evaluators need to understand your solution at a deeper level, and defend their scores to decision makers.

Your proposal says a lot about you. Unfortunately, intent and reception are not the same thing. Make sure your intended message reaches evaluators loud and clear by eliminating these common writing missteps that can undermine your sale process.

Let's Talk.

> We hope you found this information valuable. We'd love to learn more about your proposal challenges and share how we can help. Contact us today!
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Follow us on LinkedIn for more value-driving content, such as What Evaluators (Really) Want.

Until then, keep calm and proposal on!