

# **Writing Compelling Proposals: A Proposal Guide for Project Managers**

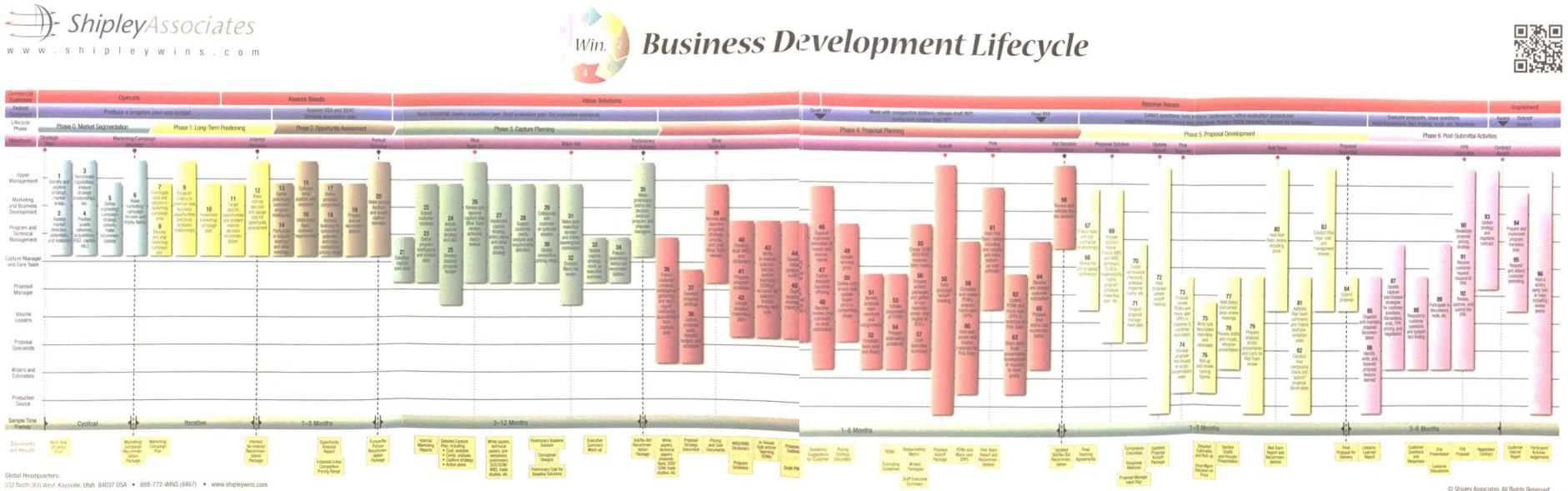
**Danielle Torley, PMP, CF.APMP  
February 22, 2017**

# PMI Processes

- 5 process groups
- 10 knowledge areas
- 47 processes

		Project Management Process Groups				
		Initiating	Planning	Executing	Monitoring & Controlling	Closing
Knowledge Areas	Project Integration Management	4.1 Develop Project Charter	4.2 Develop Project Management Plan	4.3 Direct and Manage Project Work	4.4 Monitor and Control Project Work 4.5 Perform Integrated Change Control	4.6 Close Project or Phase
	Project Scope Management		5.1 Plan Scope Management 5.2 Collect Requirements 5.3 Define Scope 5.4 Create WBS		5.5 Validate Scope 5.6 Control Scope	
	Project Time Management		6.1 Plan Schedule Management 6.2 Define Activities 6.3 Sequence Activities 6.4 Estimate Activity Resources 6.5 Estimate Activity Durations 6.6 Develop Schedule		6.7 Control Schedule	
	Project Cost Management		7.1 Plan Cost Management 7.2 Estimate Costs 7.3 Determine Budget		7.4 Control Costs	
	Project Quality Management		8.1 Plan Quality Management	8.2 Perform Quality Assurance	8.3 Control Quality	
	Project Human Resource Management		9.1 Plan Human Resource Management	9.2 Acquire Project Team 9.3 Develop Project Team 9.4 Manage Project Team		
	Project Communications Management		10.1 Plan Communications Management	10.2 Manage Communications	10.3 Control Communications	
	Project Risk Management		11.1 Plan Risk Management 11.2 Identify Risks 11.3 Perform Qualitative Risk Analysis 11.4 Perform Quantitative Risk Analysis 11.5 Plan Risk Responses		11.6 Control Risks	
	Project Procurement Management		12.1 Plan Procurement Management	12.2 Conduct Procurements	12.3 Control Procurements	12.4 Close Procurements
	Project Stakeholder Management	13.1 Identify Stakeholders	13.2 Plan Stakeholder Management	13.3 Manage Stakeholder Engagement	13.4 Control Stakeholder Engagement	

# Shipley Business Development Lifecycle



- 7 phases (0. market segmentation, 1. long-term planning, 2. opportunity assessment, 3. capture planning, 4. proposal planning, 5. proposal development, 6. post-submittal activities)
- 96 steps (60 steps in proposal planning, development, and closeout)

# PMI + Shipley =



# PMI / Shipley

PMI Process	Shipley Proposal Process
Initiating	<ul style="list-style-type: none"><li>• Review and Approve the Capture Plan (26)</li><li>• Assess the Request for Proposal (or Draft)</li></ul>
Planning	<ul style="list-style-type: none"><li>• Develop a Proposal Strategy (37)</li><li>• Define Proposal Tasks (38)</li></ul>
Executing	<ul style="list-style-type: none"><li>• Conduct Tiger Teams (59)</li><li>• Develop Proposal Content (74)<ul style="list-style-type: none"><li>✓ Follow the Instructions</li><li>✓ Back It Up</li><li>✓ Time to Shine</li><li>✓ Simplify Your Graphics</li></ul></li></ul>
Monitoring & Controlling	<ul style="list-style-type: none"><li>• Maintain Your Schedule and Budget</li><li>• Conduct Proposal Reviews (80)</li><li>• Employ a Copywriter and DTP</li></ul>
Closing	<ul style="list-style-type: none"><li>• Submit the Proposal (84)</li><li>• Closeout Proposal Admin and Conduct a Lessons Learned (85, 86)</li></ul>

# 1. Initiating

## Review and Approve the Capture Plan (26)

- Do you have a capture plan?
- Do you have buy-in from key stakeholders?
- Do you know your competition?
- Do you know the evaluators?
- Do you have the resources and teaming arrangements necessary to win?
- Do you have unique Enterprise Environmental Factors and Organizational Process Assets?
- Make a bid/no bid decision!

# 1. Initiating

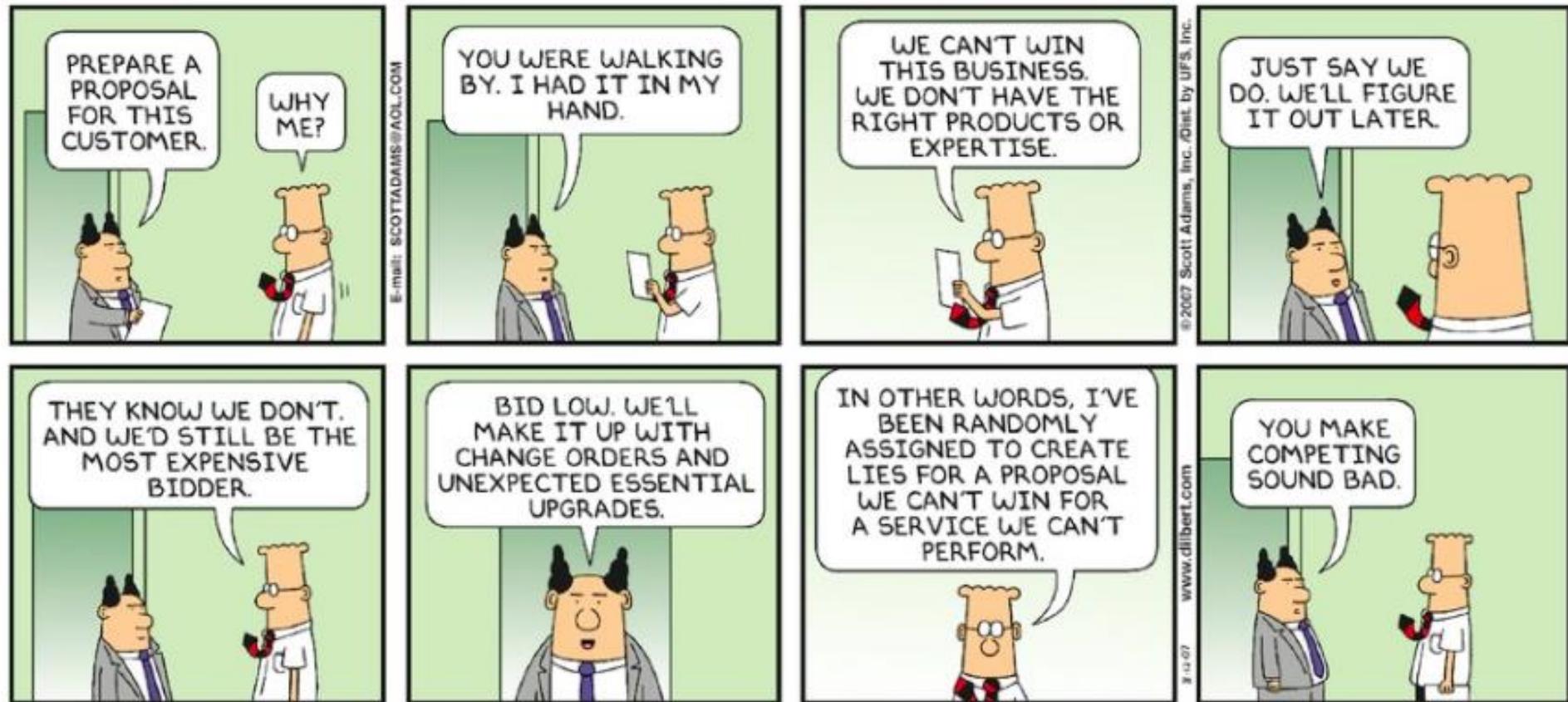
## Assess the Request for Proposal (or Draft)

Review Sections L, M, C, and H

- Consider the evaluation factors:
  - Do you need to place more importance on the technical solution than management?
  - Is it best value or lowest price?
  - How important are past performance and resumes?
- When are questions due?
- When is the due date?

## 2. Planning

### Develop a Proposal Strategy (37)



## 2. Planning

### Develop a Proposal Strategy (37)

Consider your people, processes, and tools:

#### People

- Do you have the required project management resources?
- Do you have key personnel with relevant skills and qualifications?

#### Processes

- What OPAs do you have at your disposal?
- Can you apply your existing project management strategies to the solution?
- Can you revise or create ***new*** processes that are better fit to the solution?

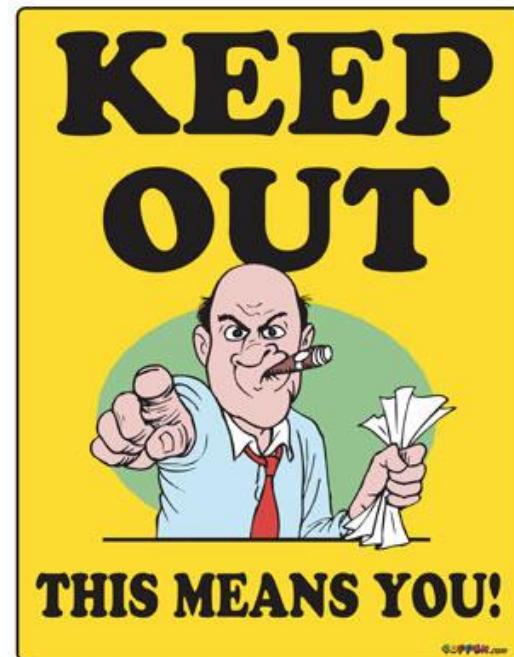
#### Tools

- What OPAs do you have at your disposal?
- Can you purchase or adopt new tools to meet requirements?

## 2. Planning

### Define Proposal Tasks (38)

- Revisit your Bid and Proposal (B&P) budget.
- Create a proposal schedule, a compliance matrix, an outline, the necessary templates, and a production plan.
- Prepare a contact list of the team, templates, and a shared drive to maintain documents.
- If possible and necessary, prepare a proposal room with no windows and a door that can be locked for privacy.



### 3. Executing

#### Conduct Tiger Teams (59)

- Use small group strategy meetings with Subject Matter Experts and corporate business units to brainstorm your proposal response.
- Establish themes and discriminators for the overall proposal and each individual section.
- Establish clear benefits to the client for each volume, factor, or section.
- Develop Proposal Development Worksheets (PDWs) and Mock-ups

### 3. Executing

#### Develop Proposal Content – Be Specific

Detail your response with specific deliverables, innovative solutions, and cost savings for the customer.

Instead of:

*“Our knowledgeable project management team has years of experience...”*

Try something like:

*“We implement a funded cross-training program (at no additional cost to the client) and require all Project Managers to support an overseas survey and/or installation every year to maintain field experience.”*

### 3. Executing

#### Develop Proposal Content – Back it up!

Use numbers and quantitative statements to provide concise proof of your achievements.

Instead of:

*“We have extensive experience and years of expertise doing X, Y, Z.”*

Try something like:

*“Since 2014, we have completed 25 projects in 15 locations worldwide.”*

### 3. Executing

#### Develop Proposal Content – Time to shine

Provide customer kudos and vignettes to quantifiably prove past performance.

Instead of:

*“We have high customer satisfaction on current and past projects”*

Try something like:

*“Our customer satisfaction surveys provide an average rating of 9.5 out of 10 on completed projects”*

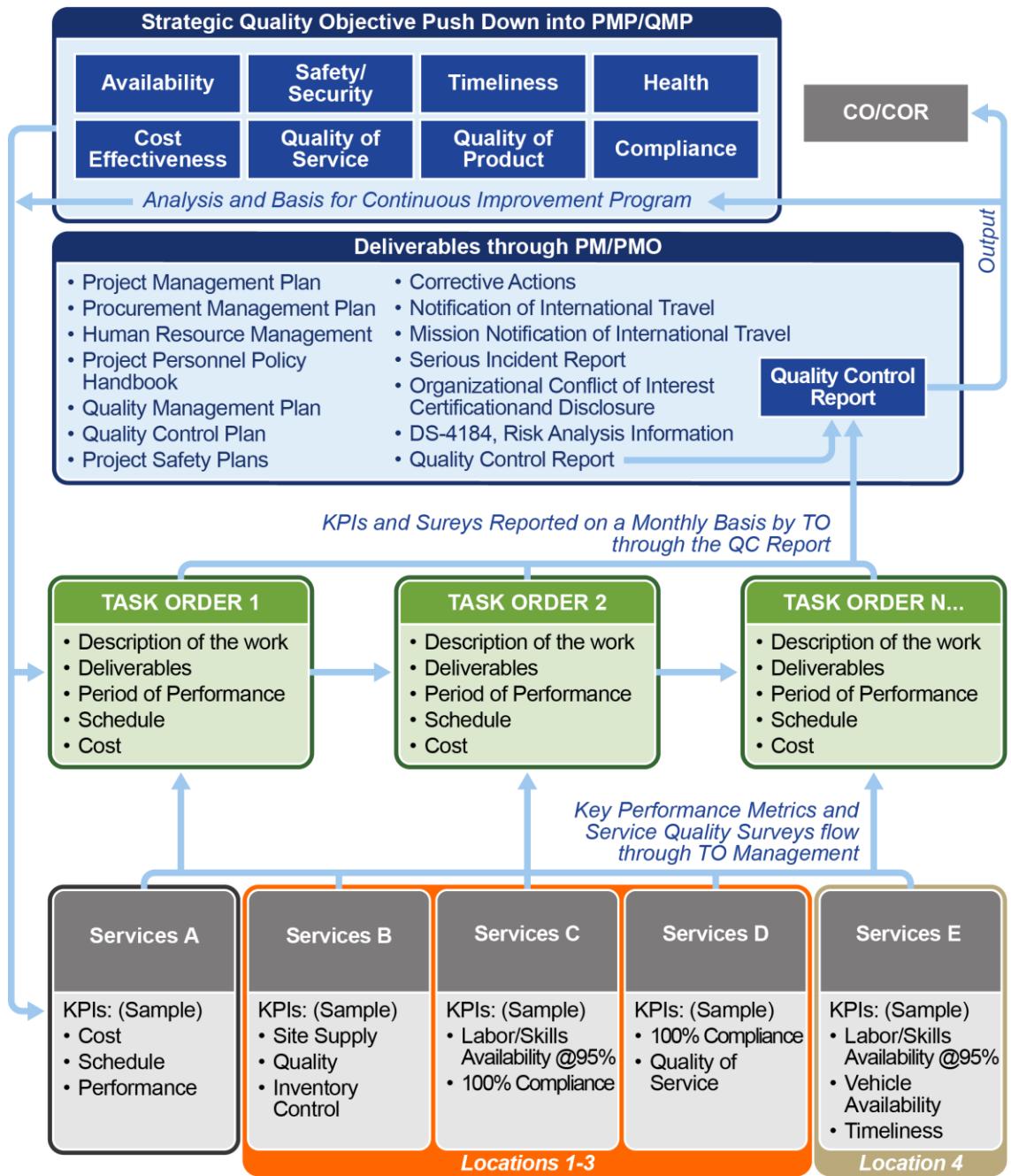
or

*“Regarding our recent project in Tennessee, John Smith from the Department of Defense recently wrote that ‘Company ABC was the most professional company that he’s worked with in his career.’”*

# 3. Executing

## Develop Proposal Content – Simplify Your Graphics

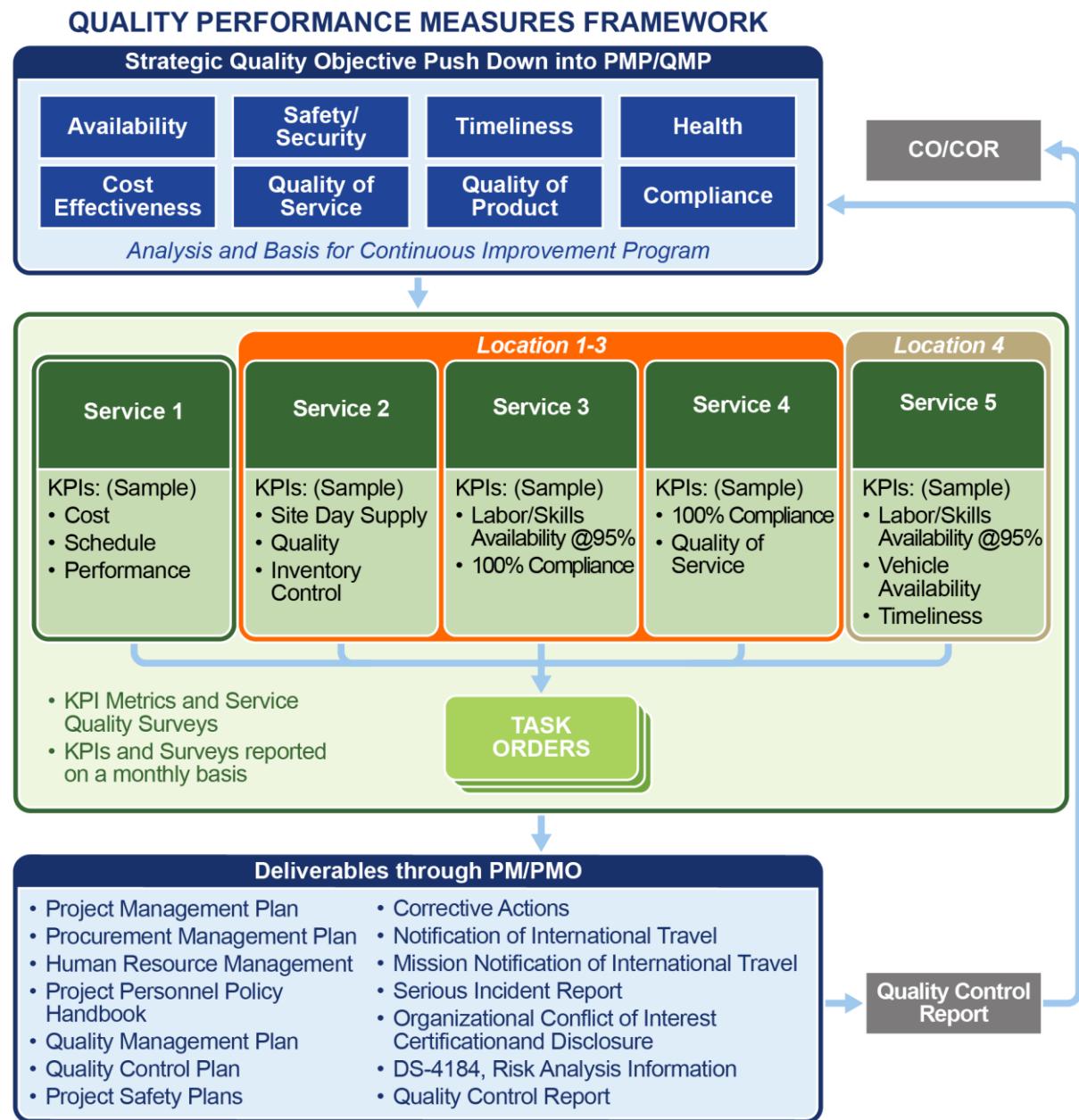
- Large, complex graphics without a discernible beginning or end can be complicated for the reader.



### 3. Executing

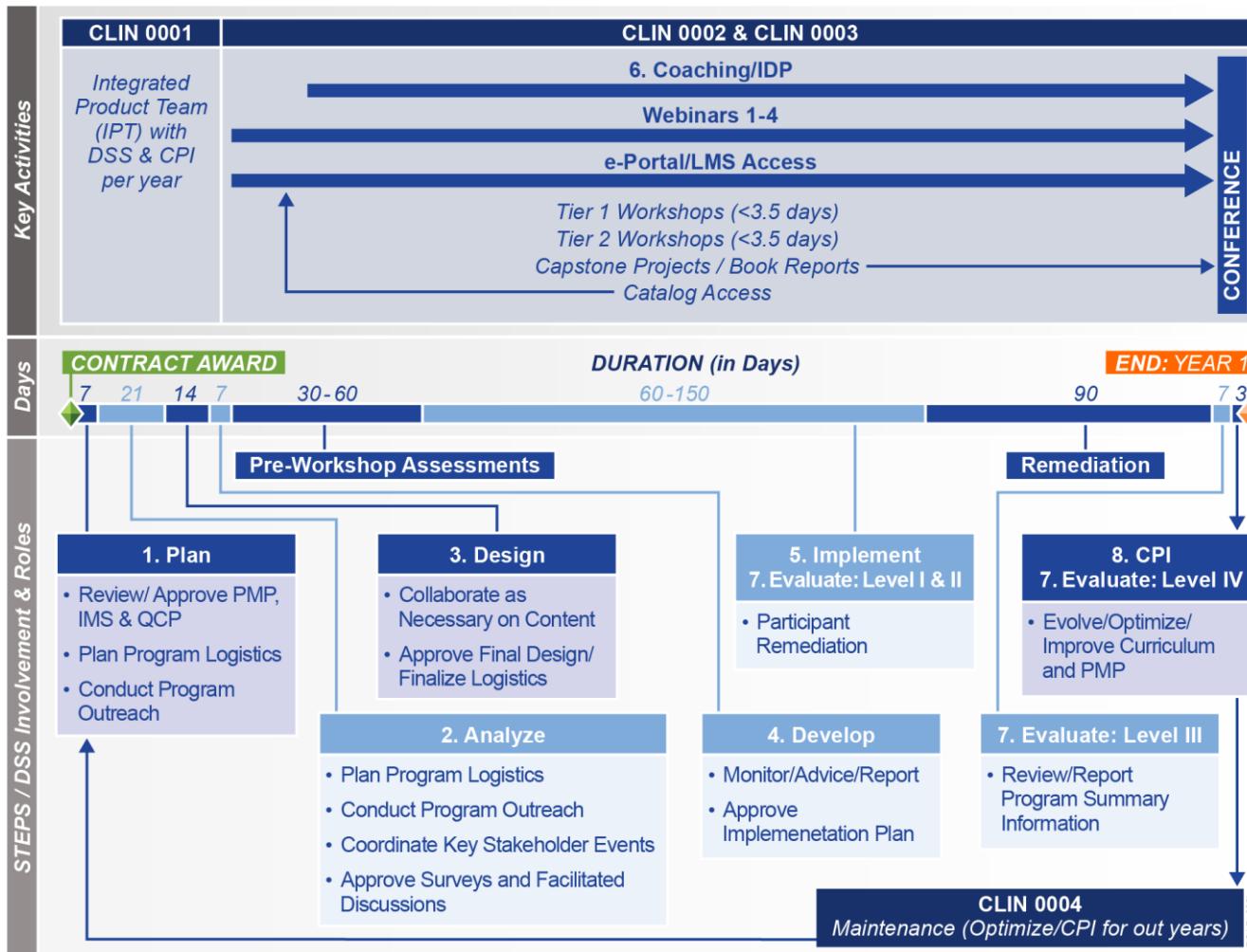
## Develop Proposal Content – Simplify Your Graphics

- Develop simple, easy-to-follow graphics that immediately depict your concept.



# 3. Executing

## Simplify Your Graphics



### 3. Executing

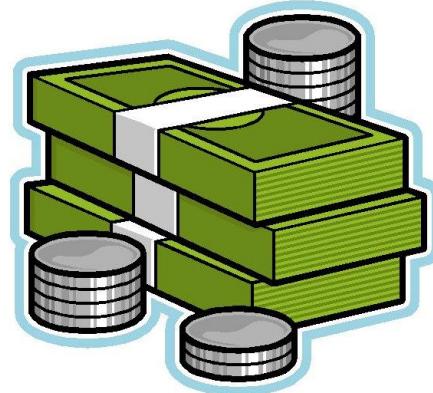
## Simplify Your Graphics



# 4. Monitoring & Controlling

## Maintain Your Schedule and Budget

- Schedule daily or weekly status meetings with the team. Proposals are typically conducted with multiple sections in parallel. If more time is needed, crash the schedule by increasing resources.
- Track budget costs for consultants, travel, and production.



# 4. Monitoring & Controlling

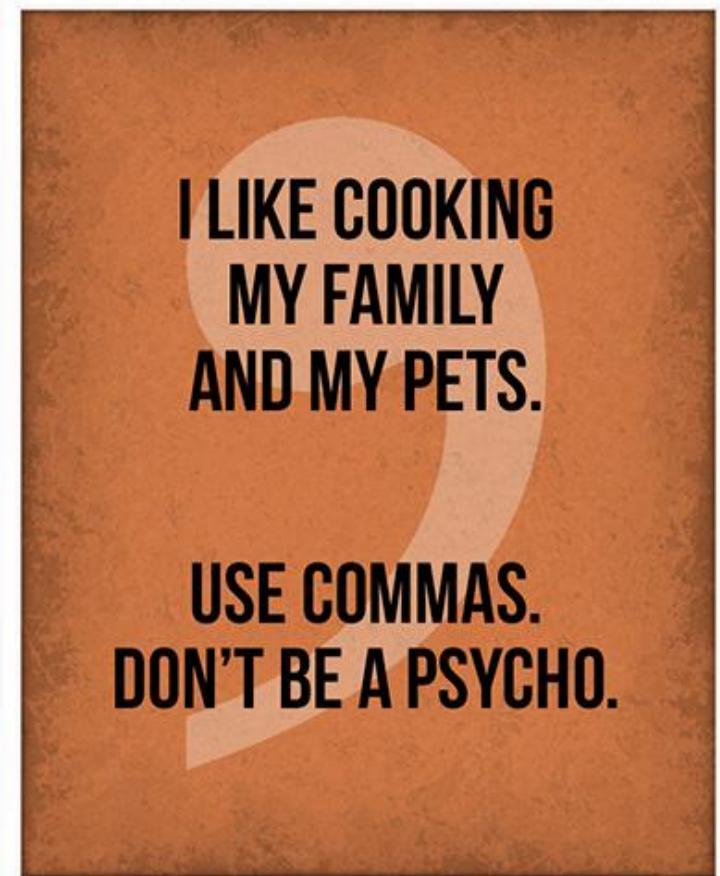
## Conduct Proposal Reviews (80)

- WHO:
  - ✓ Management and key stakeholders.
  - ✓ If working with a smaller team, have writers review each others' work.
- WHAT:
  - ✓ Check for compliance with the RFP – does the proposal respond to every single RFP requirement?
  - ✓ Conduct an overall assessment to ensure the solution is realistic, compelling, and cost-efficient – is this document interesting to read and visually appealing?
- WHERE:
  - ✓ Reviews can be done virtually or in a central location.
  - ✓ Documents can be provided to each individual or posted on a wall.
- WHEN:
  - ✓ Established review times or rolling reviews.

## 4. Monitoring & Controlling

### Copy Edit / Desktop Publishing

- DO use a copy editor or desktop publisher.
  - ✓ Ensure that your document is free from spelling/grammatical errors.
  - ✓ Maintain consistent formatting.
- DON'T forget to budget time in the schedule.
  - ✓ As a general rule of thumb, schedule 40 pages per 8 hour day.



# 5. Closing

## Submit the Proposal (84)

- It's time to produce and submit! If you're lucky, send the completed document off to your production team.
- If YOU are the production team, make sure that you have a production checklist so that you don't miss anything in a hurried rush to the finish.
- When everything is ready to go, ship those documents out, deliver them hard copy, or email the soft copy to your customer.

No.	Action	Completed
1	Verify final proposal layout against RFP requirements	
2	Confirm delivery address, date, and time per any new amendments	
3	Order all supplies for final production:	
4	Have printer serviced/calibrated	
5	Create a back-up plan in case printers breakdown	
6	White Glove Review	
7	Cover/spine/back cover	
8	Signed Cover Letter	
9	Signed SF33 or SF1449	
10	Tabs	
11	Pre-labeled CD/DVDs	
12	Book Check and CD/DVD Check	
13	Delivery Receipt	
14	Box Label	
15	FedEx label	
16	Tracking Number and Notifications	

## 5. Closing

### Closeout Proposal Admin & Conduct Lessons Learned (85/86)

- Well done! The proposal is on its way to the customer and everyone can relax... a little. There's still some work to do.
- First, ***congratulate your team on a job well done!***
- Notify your teammates that the proposal was submitted and received.
- Consider holding an internal lessons learned with your team
  - ✓ Implement new or revised processes.
  - ✓ If appropriate, brief the management team on the outcomes.
- Next, clean up!
  - ✓ Organize your email files and shared drive.
  - ✓ Make sure that you have the final submitted documents some place easy to find.
  - ✓ Archive the files that you no longer need.
  - ✓ Clean up a proposal room (if you used one) and any work areas.

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