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BID & PROPOSAL CON



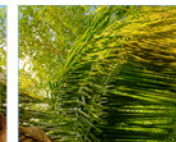
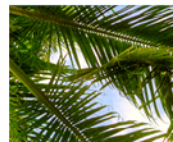
2019
ORLANDO • MAY 20-23

Improve Win Rates through Asset Integration and Content Management

Maryann Lesnick, CPP APMP
Managing Director, Lohfeld Consulting Group

Agenda

- The Challenge
- The Opportunity
- How to Get There





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The Challenge

How difficult is it to collect proof points, metrics, resumes, or past performance related to an opportunity you're trying to pursue?

knowledge management

One way to improve access to your organization's information assets and improve your win rate is by improving your internal Knowledge Management (KM) system(s).

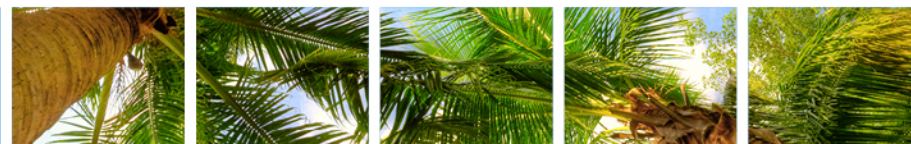


Three corporate models

- Start-up company or small business
- Mergers and acquisitions
- Disjointed corporate maturity

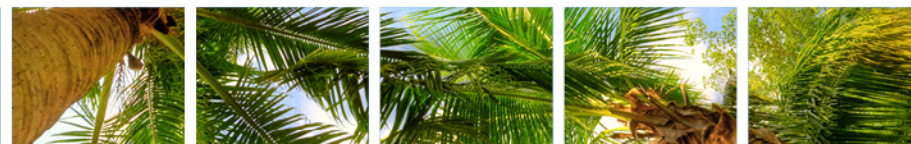
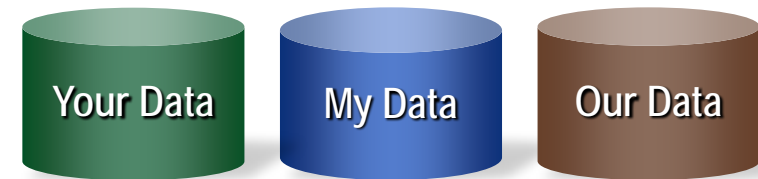
“For a business to fully realize its potential to deliver whatever may be its primary mission it must reach an overall level of maturity such that it operates as a single ‘organism’.”

Kim Parker, Corporate Maturity, 11/29/2012



A common situation (in many companies)

- Competition – inside and outside the organization
- Territory mentality
- Content silos
- Information assets span platforms, devices, databases, applications
- Duplications, gaps, inconsistencies, errors
- Difficult to get the information to support proposal efforts
 - Resumes
 - Operations
 - Past Performance
 - Etc.



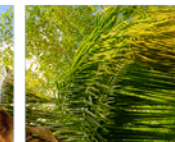
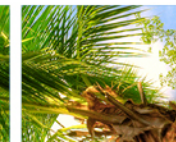
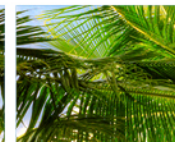
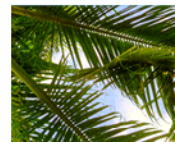
The challenges have many dimensions

- Emotional/psychological
- Political
- Technical/security
- Logistical
- Cultural/habitual
- Integrational (acquisitions)
- Maturity level
 - Small business – where do I start?
 - Large business – how did I get here?



The results – impacts on your proposals

- Lost opportunities (to present rich information, reuse content)
- Bad decisions
- Inconsistencies (branding/messaging)
- Inability to (rapidly) search and find
- Higher proposal/BD costs
- Reduced productivity
- Lower win rates





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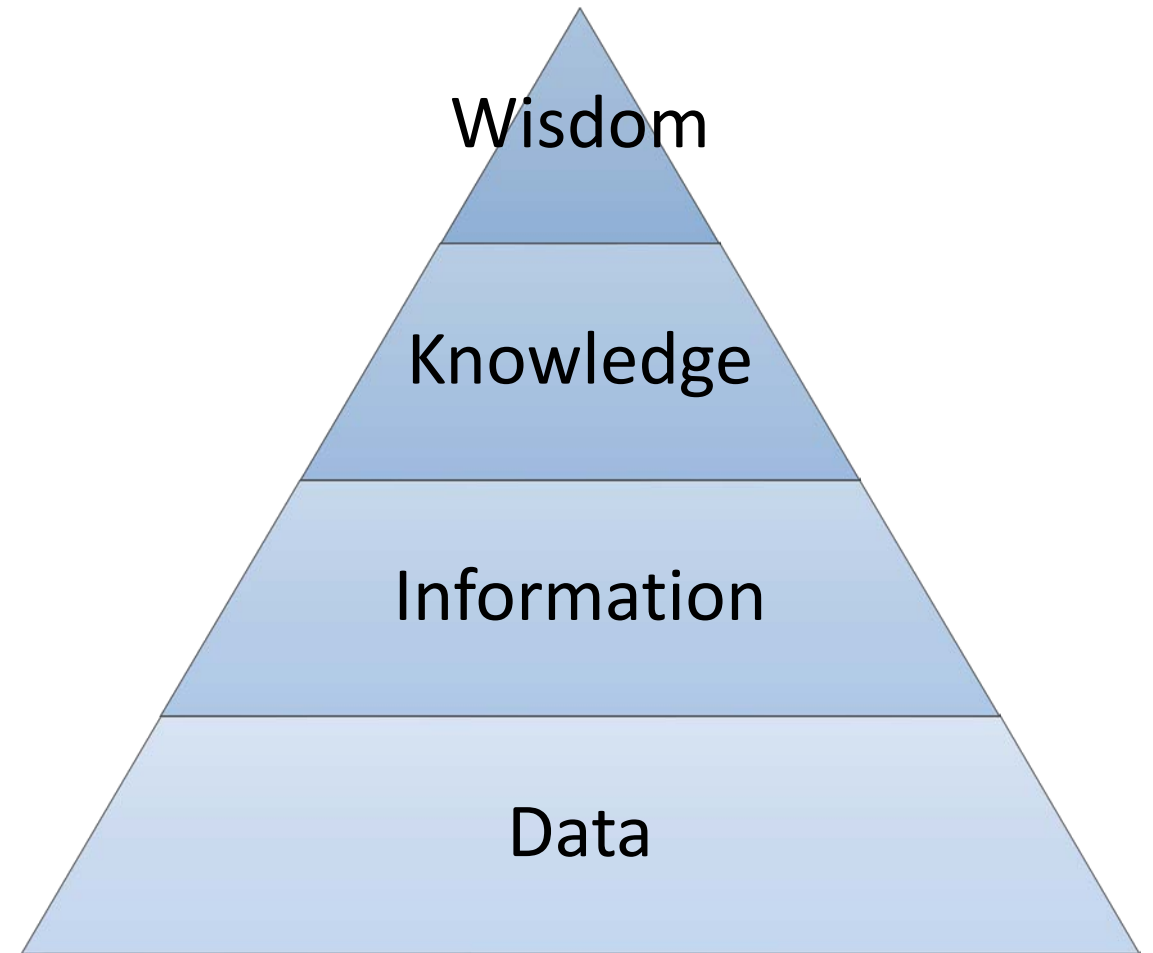


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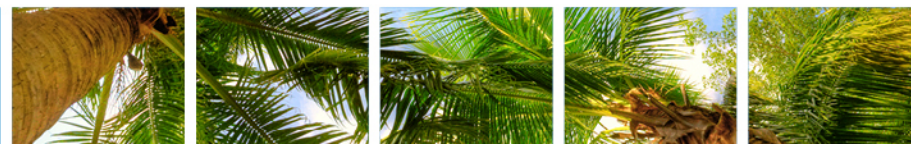
The Opportunity

The opportunity

In concert with the ITIL concept of the Data, Information, Knowledge, Wisdom (DIKW) Pyramid, successful companies establish **Knowledge Management** systems to *fully harness and apply individual, collective, and enterprise wisdom to the complex challenges of winning new business.*

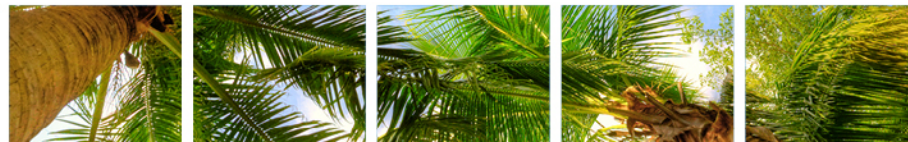


The DIKW Pyramid (Ackoff, 1989)



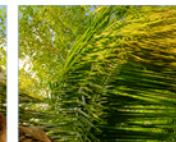
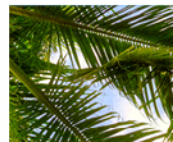
Improved information management enables companies to ...

- Work smarter
- Achieve competitive differentiation
- Quickly make appropriate bid/no-bid decisions
- Easily access all corporate information assets
- Make proposal development almost painless
- Achieve faster proposal response timeframes
- Improve integration of business functions and business units
- Standardize integration of future acquisitions
- Increase win rates



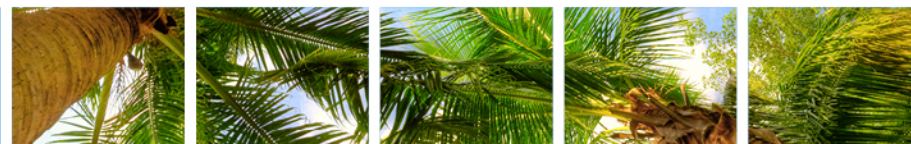
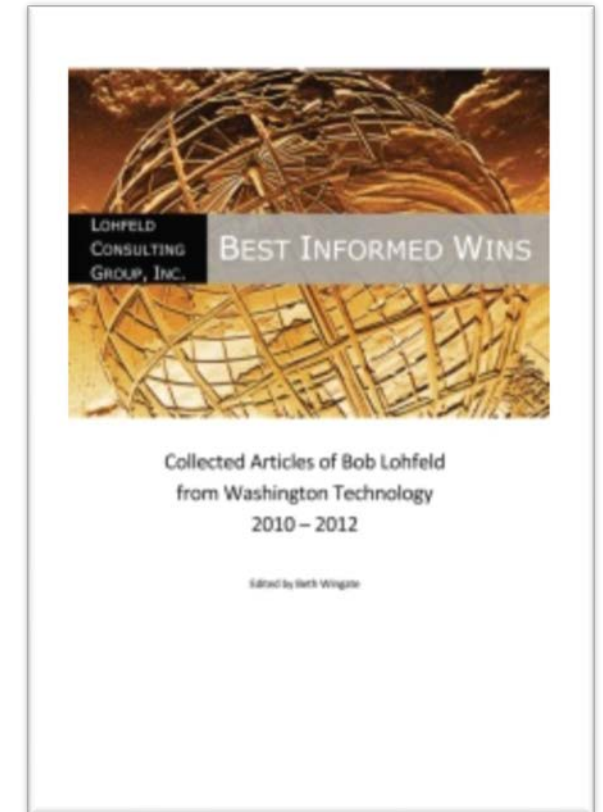
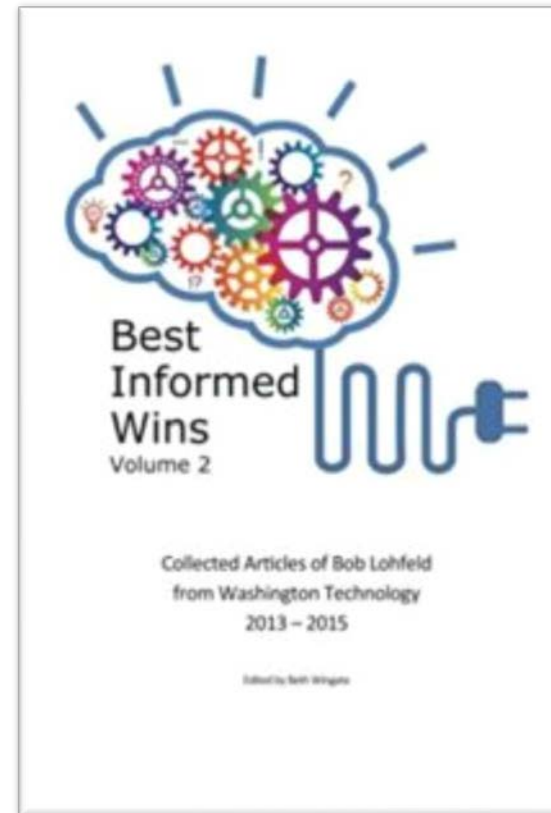
APMP definition

For proposal management (PM) and business development (BD) professionals, **Knowledge Management** means *capturing, standardizing, cataloging, and reapplying proposal content, lessons learned, best practices, customer-related knowledge, and deal-crafting expertise efficiently, easily, and appropriately—so it can be applied to the next opportunity.*



Lohfeld Consulting perspective

Best Informed Wins!





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How to Get There

A small business success story – BaseTech

Our charter: *“The Proposal Group supports business development activities by preparing and maintaining bid responses, corporate records, and processes that effectively support the capture of new business for Base Technologies.”*



Became
Proposal
Manager of
BaseTech

Conducted
an
assessment

Collaborated
to inventory
information
assets

Defined information
linkages between
Proposals, BD, HR,
Contracts, Finance,
Operations, IT

Built and
deployed an
integrated
knowledgebase of
corporate assets

Conducted
Lessons
Learned

30%
win
rate

Developed
a Charter

Developed
a plan,
received
approval,
funding

Worked with
IT to identify/
procure, and
configure an
information
platform

Established/
documented
standards,
policies,
procedures

Provided
training

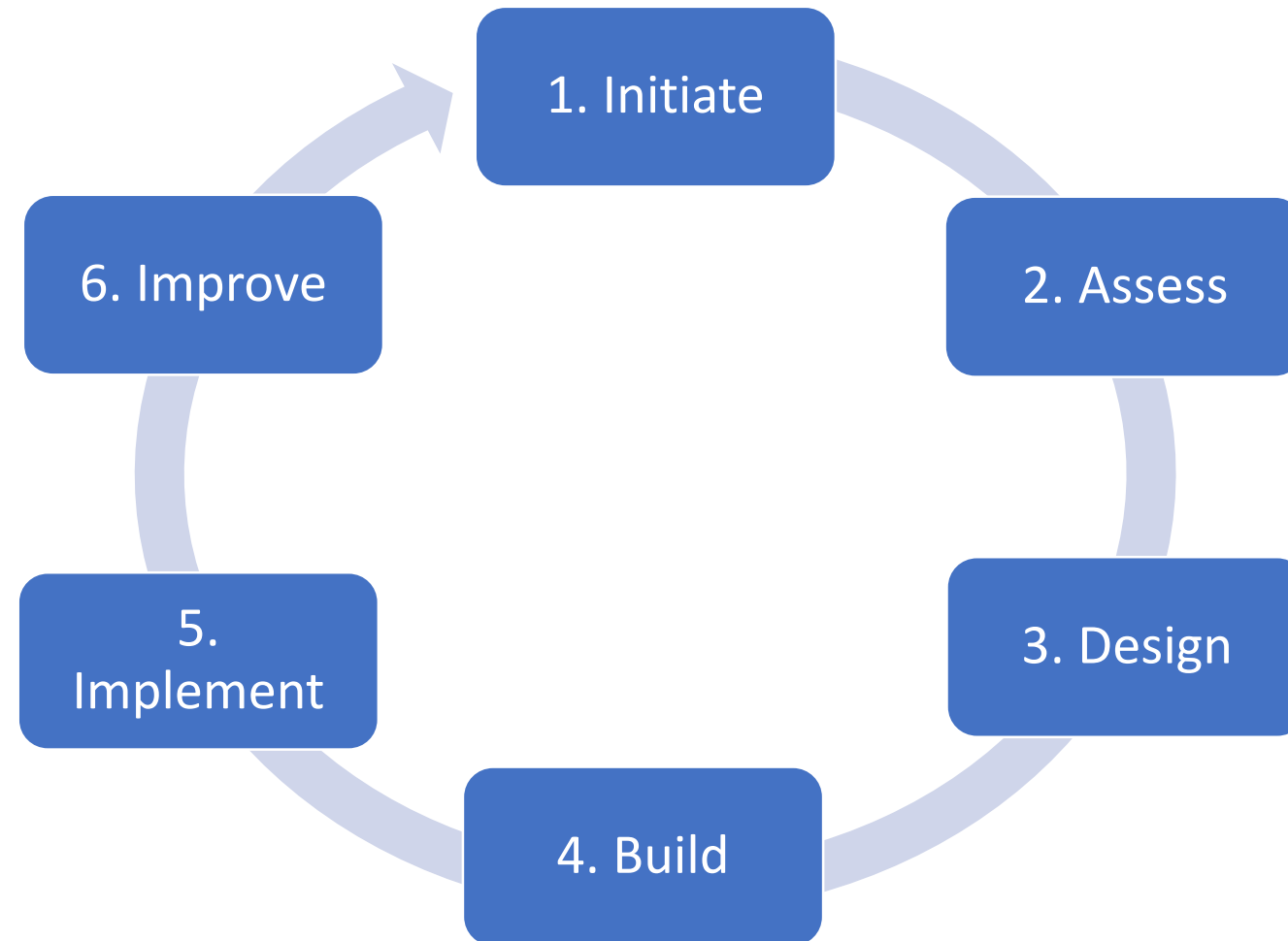
Performed
continuous
process
improvement

75%
win
rate

In 18 months, the entire BD landscape of Base Technologies changed, and continued to improve for the next 10 years.



My approach to achieve the vision





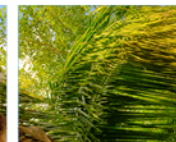
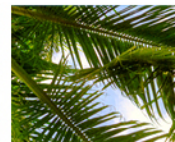
1. Initiate

- Obtain senior management endorsement
 - Encourages others to work towards a common goal
 - Provides funding for time and technology
- Identify an integration team
 - Include representatives from each business unit and function
 - Should be knowledgeable about information assets and processes in their business area



2. Assess – identify and analyze current state

- What information assets do you have?
- Where is it, and in what format?
- Who owns it?
- How is it obtained?
- How is it used?
- Who uses it?
- Who else *could* use it?



Best accomplished through collaboration

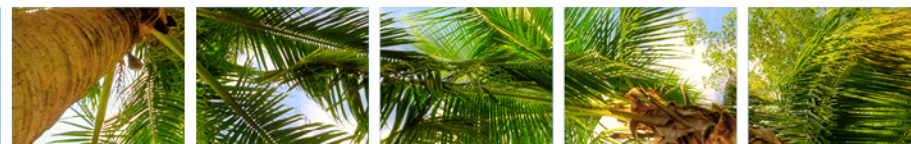
The integration team manages activities through

- Brainstorming
- A series of collaboration meetings
- Strategy sessions that include all key stakeholders
- Communicating progress regularly to senior management
- Promoting a common goal – *WINNING!*



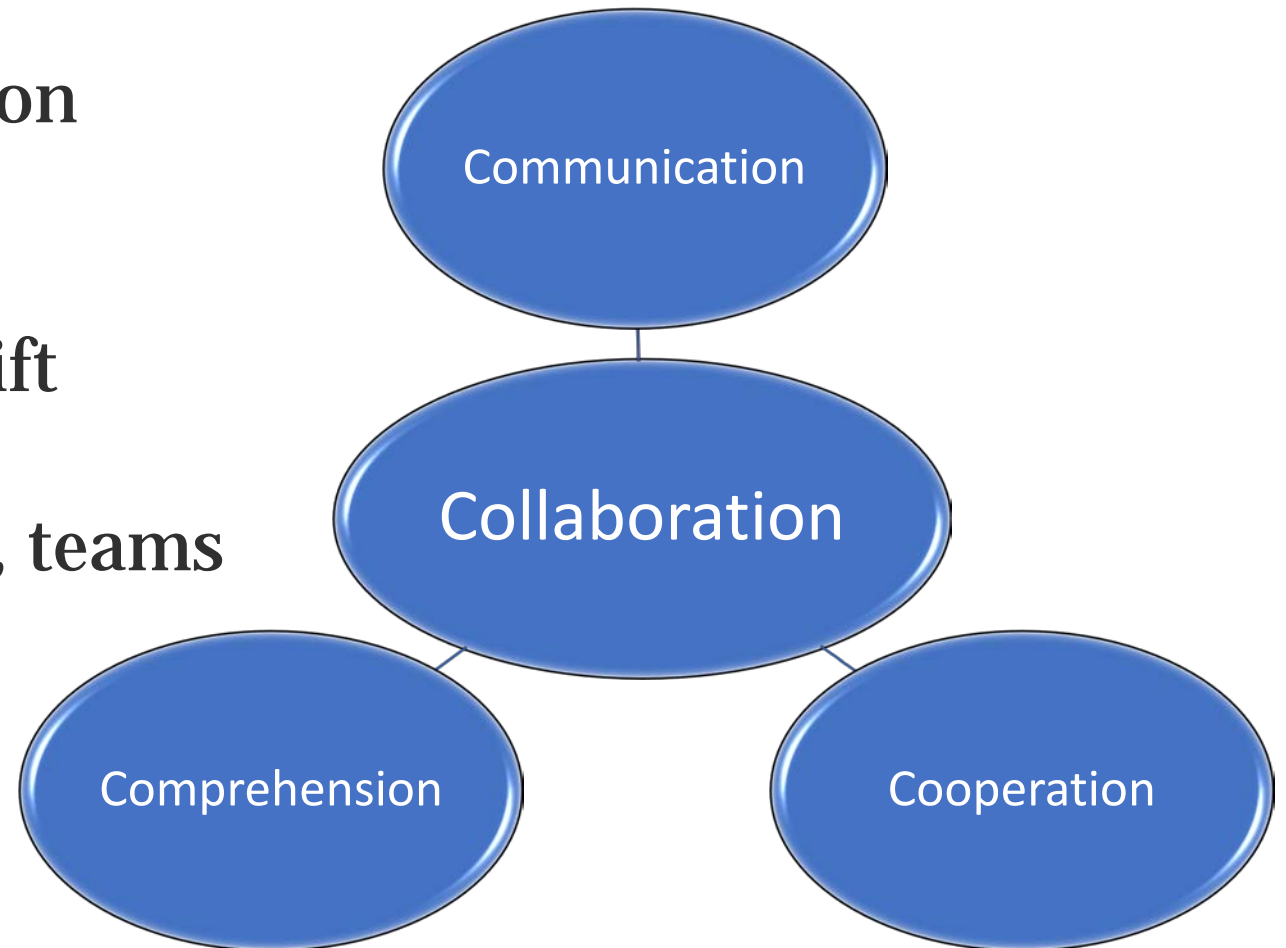
“The one truly significant aspect of my approach was a focus on complete corporate integration – of people, tools, and information – all with a shared vision for winning.”

Maryann Lesnick’s PPIP



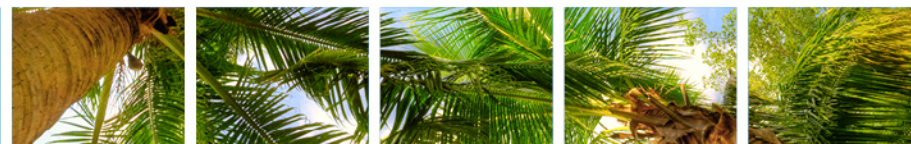
Communicate – Cooperate – Comprehend

- Promotes innovation and vision
- Creates enthusiasm
- Achieves buy-in and trust
- Begins a corporate culture shift
- Fosters acceptance to change
- Builds corporate connections, teams
- Reveals other uses for data



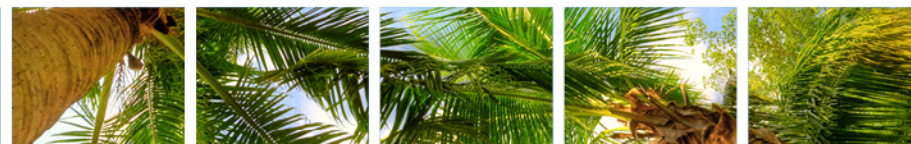
What information assets do you have?

- BD/capture artifacts
- Proposal artifacts
- Competitor/partner intel
- Customer intel
- Resumes
- Past performance
- Boilerplate
- Templates
- Checklists
- Success stories, kudos
- Financial data
- Metrics
- Standards, polices and procedures
- Certifications and awards
- Graphics
- Lessons learned
- Contracts, mods
- Technical solutions
- Management plans
- Marketing materials
- Logos
- Clearance records
- Style guides
- Transition and QC plans
- Reusable materials
- Previous RFPs
- Debriefs
- Risk registers
- Strengths registers
- Contract progress reports, quarterly reviews
- Innovations
- HR & recruiting practices
- Benefits, comp plans, overtime policies
- CPARS



Where are they?

- Salesforce
- SharePoint
- CostPoint
- HR Connect
- Deltek T&E
- CMS tool
- Google Drive
- EventBrite
- File cabinet
- A napkin
- Desktop
- Laptop
- iPad
- Share drive/server
- Dropbox
- Thumb drive
- Personal computer at home
- In someone's head



In what format?

- Word
- Excel
- Adobe .pdf
- PowerPoint
- Paper
- .jpg, .png
- Visio
- Email
- Thoughts, ideas



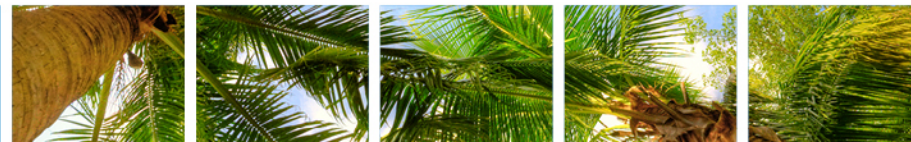
Who owns them?

- BD
- Capture
- Proposals
- IT
- Contracts
- HR
- Finance
- Operations
- Security
- QMS Team
- PMO
- Marketing
- Individuals

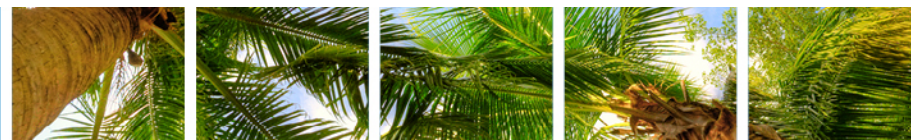
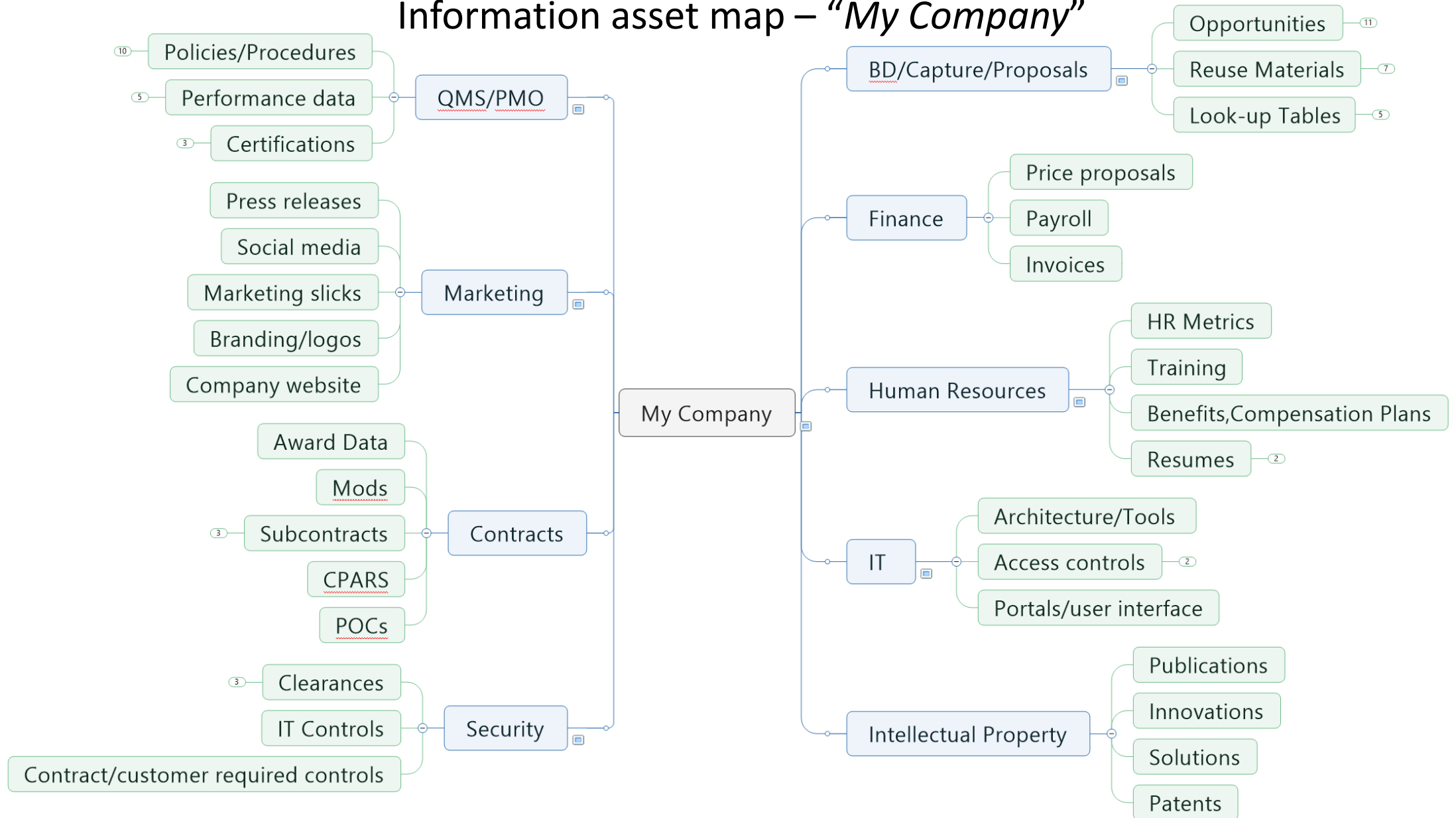


How is the information obtained? Used?

Asset	Source(s)	Owned by	Used for	Could be used by	Where located
Resumes	<ul style="list-style-type: none"> Recruiting databases Employees Partners/ subs 	HR	<ul style="list-style-type: none"> Hiring decisions Proposals Career development Assignments Performance reviews Proof of experience to CO 	<ul style="list-style-type: none"> HR Operations (PM) Proposals Contracts The employee 	Share drive
Past Performance	<ul style="list-style-type: none"> PM of each contract 	Proposals	<ul style="list-style-type: none"> Proposals BD/Capture Teaming, corp. quals 	<ul style="list-style-type: none"> Other PMs Marketing 	SharePoint
Competitor Intelligence	<ul style="list-style-type: none"> Word of mouth GovWin Company web 	BD/Capture	<ul style="list-style-type: none"> Bid decisions Ghosting in proposals Win strategies Solutioning 	<ul style="list-style-type: none"> BD Capture Proposals 	SalesForce



Information asset map – “My Company”



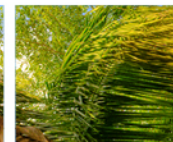
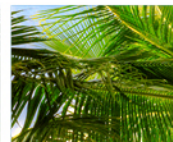
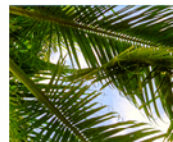
Analyze your asset inventory

- Identify and resolve:
 - Duplications
 - Gaps
 - Errors or inconsistencies
 - Relevancy
 - Timeframe
- Document interfaces/linkages
 - What relates to what?



3. Design your knowledgebase structure of the future

- Define how your information will be linked and stored
- Tools/platforms
- Libraries, folder structures, lists
- Indexes
- Interfaces
- Access rights



Two categories of information

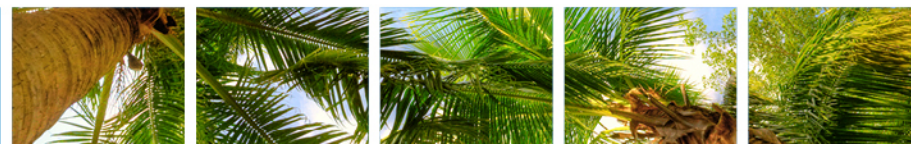
➤ Corporate assets

- SOPs
- Standards
- Templates
- Marketing materials
- Resumes
- Teaming partner information
- QMS

➤ Opportunity assets

- Project intelligence
- Capture data
- Solicitation artifacts
- Proposal artifacts
- Operations/performance data

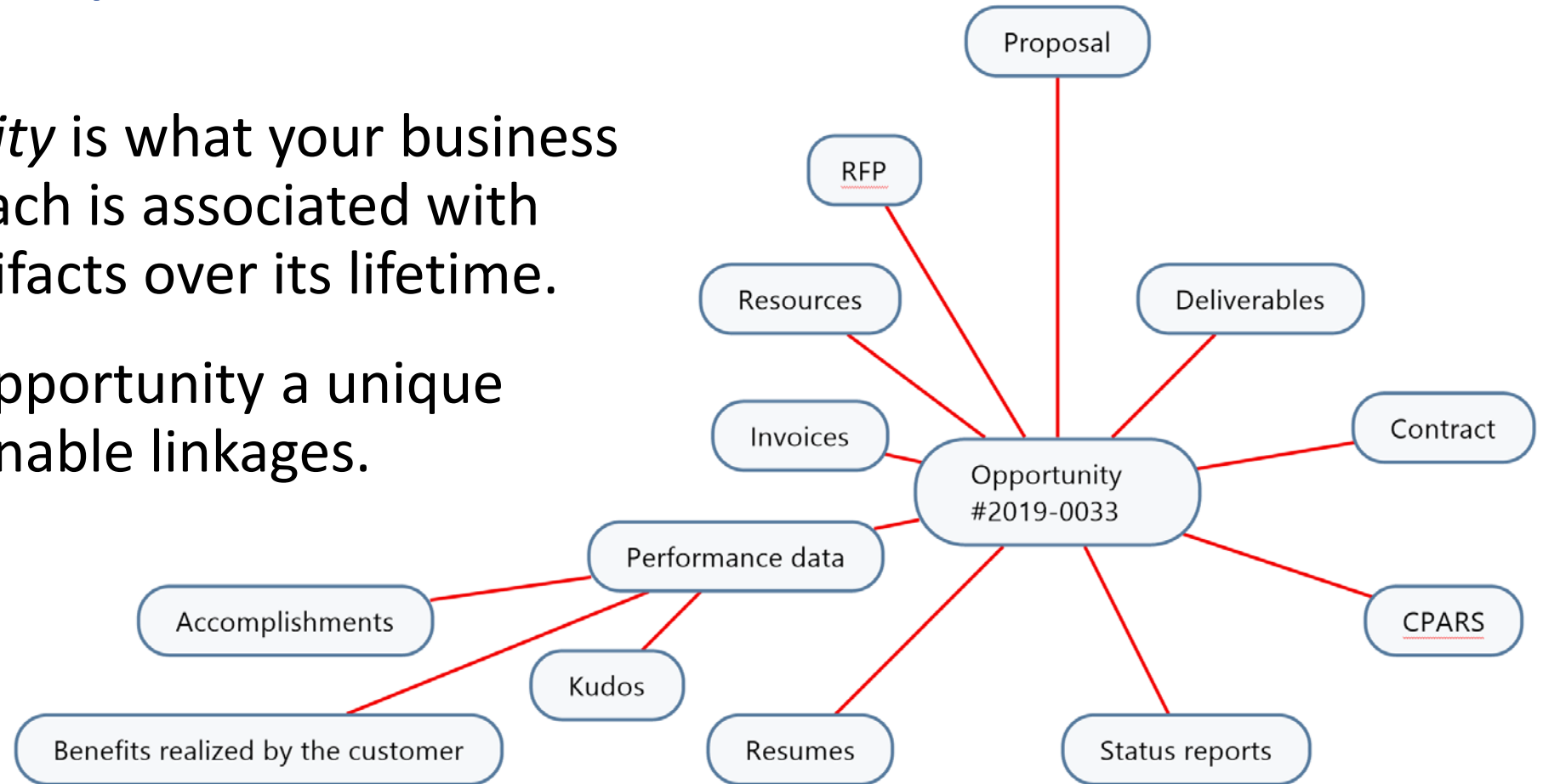
- Corporate assets may be associated with one or more opportunities
 - Resumes
 - Teaming partners



Opportunity assets

The *opportunity* is what your business is all about. Each is associated with numerous artifacts over its lifetime.

Assign each opportunity a unique identifier to enable linkages.



Create look-up tables for consistency in searches

These can be defined as lists in SharePoint

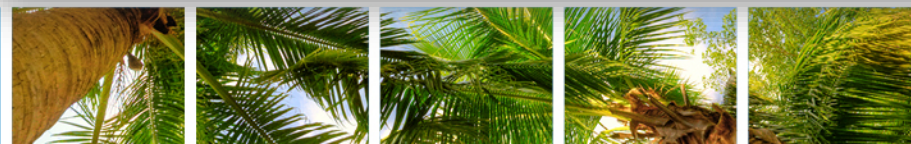
- Customer names
- Corporate names
- Business Units
- BD Leads
- Opportunity disposition status (lifecycle phase, bid/no-bid, win/lose/cancelled)

Proposal Manager

Maryann Lesnick
Jerry Brown
Margaret Smith
Harry Hicks
Larry Frost

Customer Agency

Department of Agriculture
Department of Homeland Security
Department of Justice
Department of State
Environmental Protection Agency



A sample code table - *disposition status*

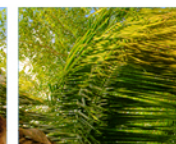
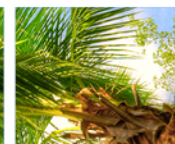
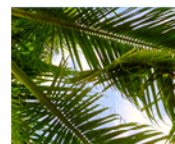
BD Lifecycle Phase	Disposition Status
1. Pipeline	101 – Pipeline
2. Capture	201 - Pre-RFP
	202 - RFI In Progress
	203 - RFI Submitted
3. Proposal	301 - Proposal In Process
4. Post-Submittal	401 - Proposal Submitted, Pending Award
	402 - Protest in Process

BD Lifecycle Phase	Disposition Status
5. Post Award	501 - WON - Pending Signed Contract
	502 - Protest in Process
	503 - WON - Contract Execution
	504 – Lost
	505 - Contract Completed
6. Other	601 – Cancelled
	602 - Withdrawn by Customer
	603 - No Bid

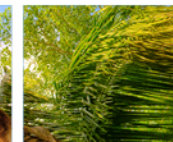
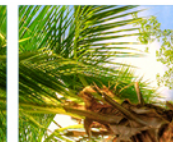
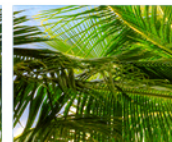
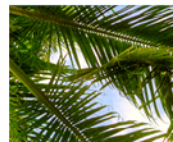
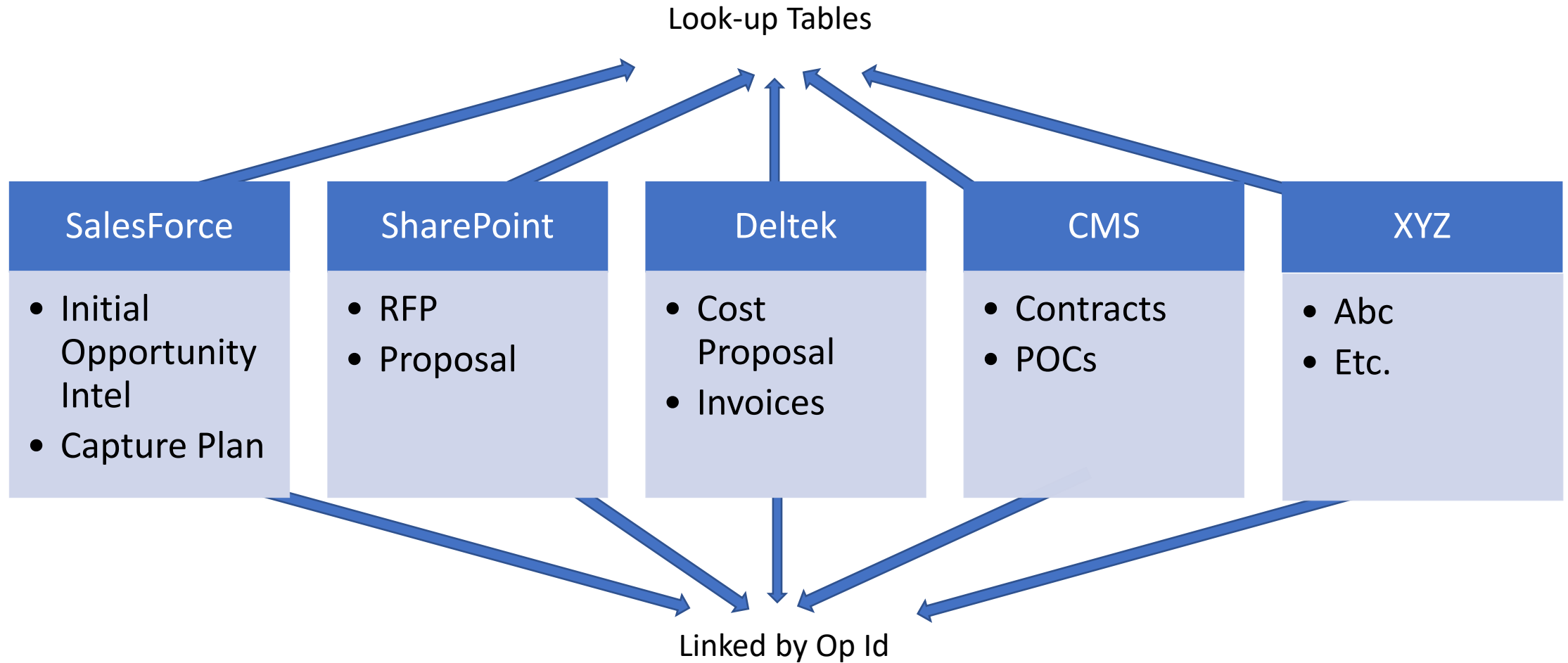


Configure - target state?

- Consider
 - Current architecture/investments
 - Budgets
 - Architecture options
- Set evaluation criteria
 - Searchable
 - Secure
 - Versioning
 - Collaboration

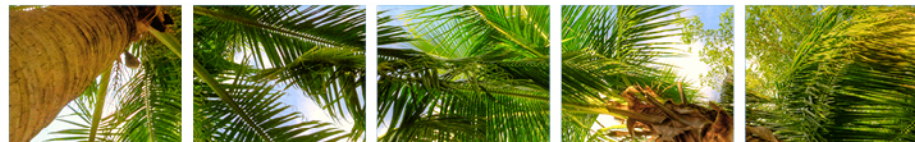


Define the architecture



Options for creating linkages/interfaces

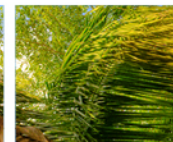
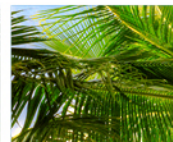
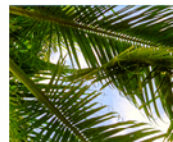
- SharePoint Lists
- Custom dashboards
- Embedded hyperlinks



SharePoint list option – “Tracker” record

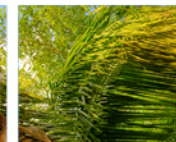
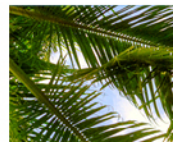
Opportunity Record

- Op-Id
- Name
- Customer (look-up list)
- Disposition Status (look-up list)
- Owner (look-up list)
- Business Unit
- Linkages
 - Link to proposal library
 - Contracts link
 - Salesforce link
 - FBO link
 - GovWin #
- Solicitation Specifics
 - RFP Release Date
 - Response Due Date
 - Questions Due
 - Conference Date
 - Orals Date
 - Award Date
 - Solicitation #
 - \$ value
 - POP
 - CO Contact info
 - Key words, tags



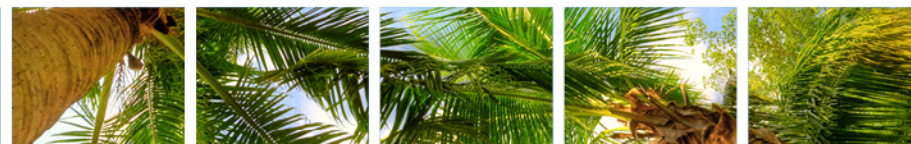
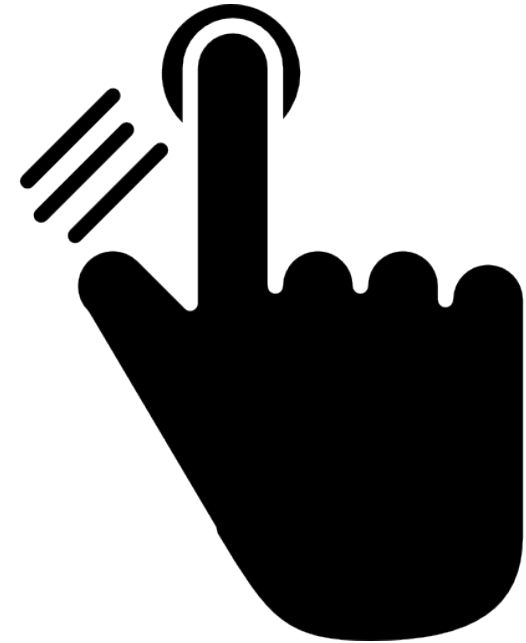
4. Build

- Finalize KM repository tools to be used (SharePoint, etc.) and secure funding
- Procure any new tools/architecture components
- Map data libraries to appropriate tools
- Establish structures for each library/repository (folder structures, data elements)
- Establish data linkages
- Create User Interfaces
 - Opportunity Register or “Tracker” (SharePoint List)
 - Dashboard
- Identify data elements that require a standard lexicon (Customer name, partner company names, business units, etc.) and define look-up lists



5. Implement

- Create related look-up tables
- Develop standard “views” for each library or list
- Migrate data
- Test linkages
- Build in security/access controls
- Develop related policies, procedures
- Train
- Launch



Procedures

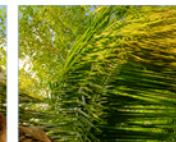
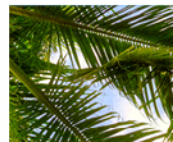
- Establish procedures for knowledge management and continuous harvesting and creation of information to ensure
 - Data is captured, maintained and used
 - Lessons learned are captured and shared
 - Accesses are defined and properly managed
- Promote a change in culture to:
 - Maintain and grow corporate intelligence
 - Continually collaborate and network to discover, collect, and share information

It's not enough to just dump information into a library – knowledge development and sharing, supported by a passion for winning, are essential!!



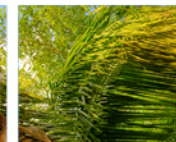
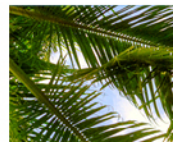
6. Maintain/improve

- Add views to produce common reports
- Continually review and improve information architectures and related procedures
- Measure success
 - Usage
 - Improved information access
 - Productivity
 - Consistency
 - Improved win rates



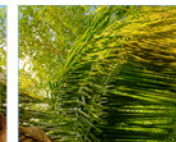
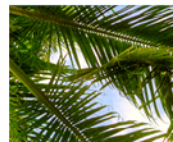
Expected outcomes

- Enhanced productivity
- Improved version control, data quality, and data integrity
- Reuse of content to minimize rework
- Reduced time to orient new proposal teams/personnel
- The right content can be found by the right user when needed
- Broken down silos



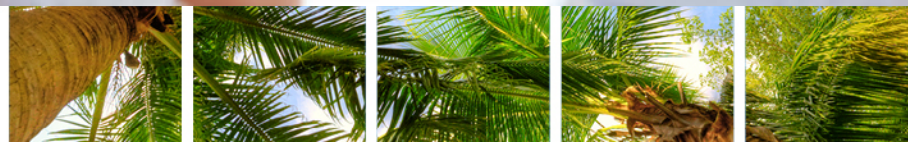
Expected outcomes, cont'd

- Improved corporate relationships
- Improved consistency, repeatability
- Improved reporting on BD metrics
- Company postured for successful ISO and other quality certifications
- Improved ability to achieve growth objectives

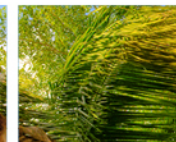
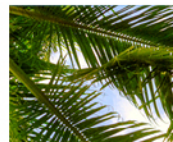


Expected outcomes, cont'd

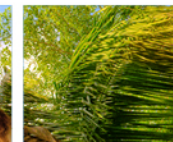
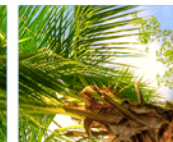
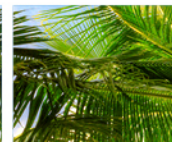
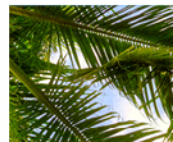
- A corporate culture with a shared passion for winning
- *IMPROVED WIN RATES!*



To be successful with knowledge management, an organization must embrace change.

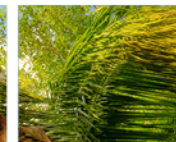
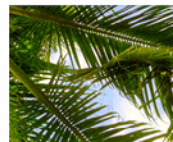


Questions?



GO TO THE APMP APP AND RATE THIS SESSION NOW

(while it's fresh in your mind!)



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