

Moving Proposals from Good to Great

INSIGHTS FROM THREE APMP FELLOWS

Lohfeld Consulting Group

Speakers:

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Beth Wingate, APMP Fellow

Brenda Crist, APMP Fellow

Introductions



Robert "Bob" Lohfeld
Chief Executive Officer of
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APMP Fellow



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President of
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APMP Fellow



Brenda Crist
Vice President of
Lohfeld Consulting Group
APMP Fellow

Questions for the Audience

- Do you think you know what a proposal “strength” is?
- Do you often put too much effort into proposal sections that aren’t going to be scored?
- Do you regularly have a high-scoring solution before the RFP drops?
- Do you review your proposals like an evaluator?
- Does your company maintain a “standard of excellence” for proposals?

What makes a great proposal?



High-scoring = A proposal that is rich in features that can be scored as **evaluation strengths**

Strength = A feature of an offer that exceeds a contract requirement in a way that is beneficial to the customer

It's all about Strength-Based Winning®

Color Rating	Adjectival Rating	Rating Description
Blue	Outstanding	Proposal indicates an exceptional approach and understanding of the requirements and contains multiple strengths .
Purple	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength .
Green	Acceptable	Proposal indicates an adequate approach and understanding of the requirements.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements.
Red	Unacceptable	Proposal does not meet requirements of the solicitation and, thus, contains one or more deficiencies and is unawardable.

Great proposal scoring highly across all evaluated criteria and offering best value at an acceptable level of risk

10 Tips for Taking Your Proposal from Good to Great



Tip #1 | Use a Strength-Based Solutioning® Approach

- Bound the scope
- Create the basic solution
- Identify the features, benefits, and proof points to be scored as strengths
- Determine additional information needed
- Repeat this iterative process

Tip #1 | Identify the features to be scored as strengths example

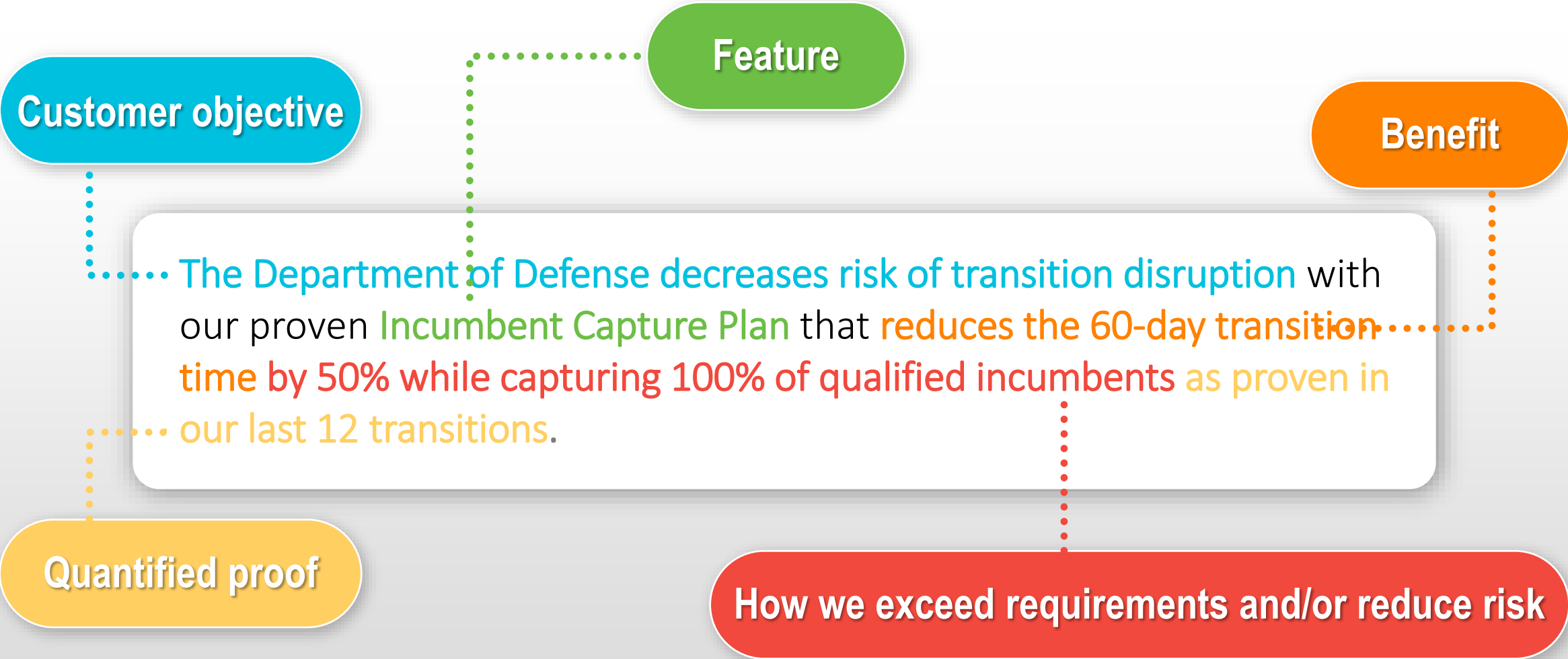
To meet the customer objective of	Our firm offers the following features	Relevant benefits of these features	Evidence for benefits
Reducing the ability of predators to penetrate the network by 10%	<ul style="list-style-type: none">• Use our behavior and AI-based research to predict and detect predators• Use our analytics dashboard to view predators and take informed actions• Have our risk-based alerting system alert you to threats when you are not watching the dashboard• Use our dashboard to view threats across your hybrid platforms	<ul style="list-style-type: none">• Accurate behavior and AI-based predictions of predator behavior• Analytics dashboard with successive layers of detail for identifying and managing predator behavior• Customizable alerting system that drowns out the noise• Dashboard that spans all hybrid platforms	Customers across DOD have received 40% fewer cyber breaches for five relevant DOD projects across all their platforms using our behavior and AI-based tools, dashboards, and alerting system

Strength Attributes: Exceeds requirements AND lowers risk significantly

Tip #2 | Design your proposal to be scored, and not read

1. Build your own scorecard tied to the evaluation criteria
2. Put each strength where it will be scored
3. Each strength statement must include the feature, benefit, proof
4. Preferred construct is customer objective, feature, benefit, exceed description, and proof point
5. Make strengths pop off the page
6. Sleepy evaluator 10-second test – can you skim the page and find all the strengths

Tip #2 | Strength Statement Components



Tip #3 | Draft your briefing to the evaluators

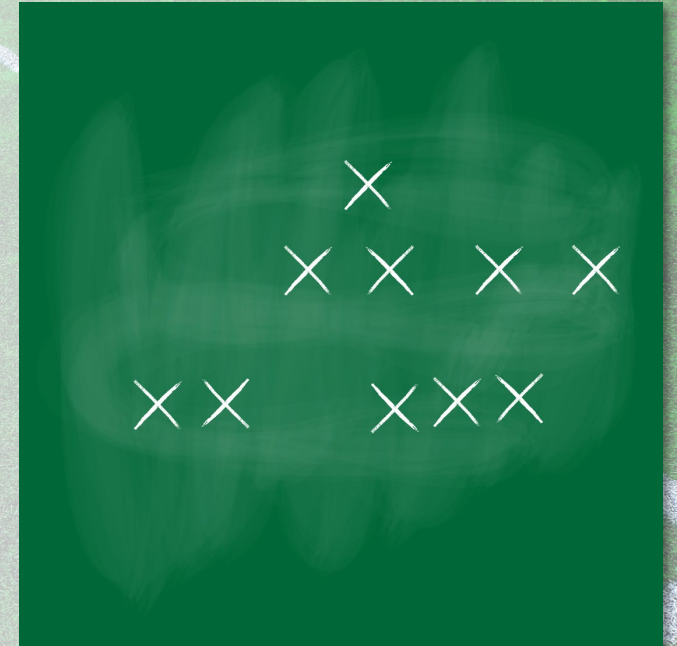
- Set a **Strength Budget** for your proposal – 40 Strengths?
- Draft a source selection briefing
- Build a company **Strengths Registry** – strengths are reusable
- Debrief – record your **Strengths Observed Metric**
 - Collect a *Strengths Observed vs. Strengths Bid Metric*
 - Root cause analysis
 - Lessons learned

Tip #4 | Build your proposal in layers



Foundation layer (Defense)

- Develop a compliance matrix and detailed outline
- Make proposal responsive to RFP requirements
- Outcome – basic proposal with no significant weaknesses or deficiencies

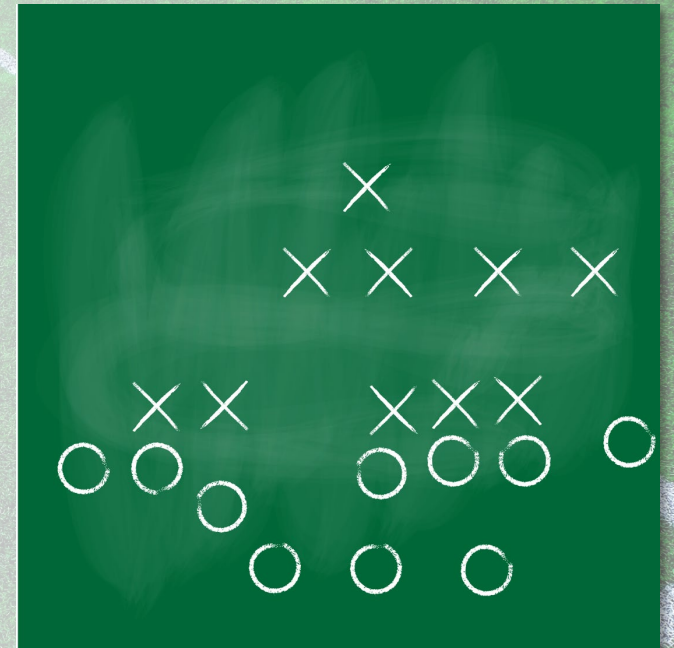


Tip #4 | Build your proposal in layers (cont'd)



Middle layer (Offense)

- Add the features/benefits/proofs/strengths into sections where they will get the most points
- All benefits focused on mission and evaluation factors
- Outcome – a compelling proposal rich in features with proven benefits that may be scored as strengths

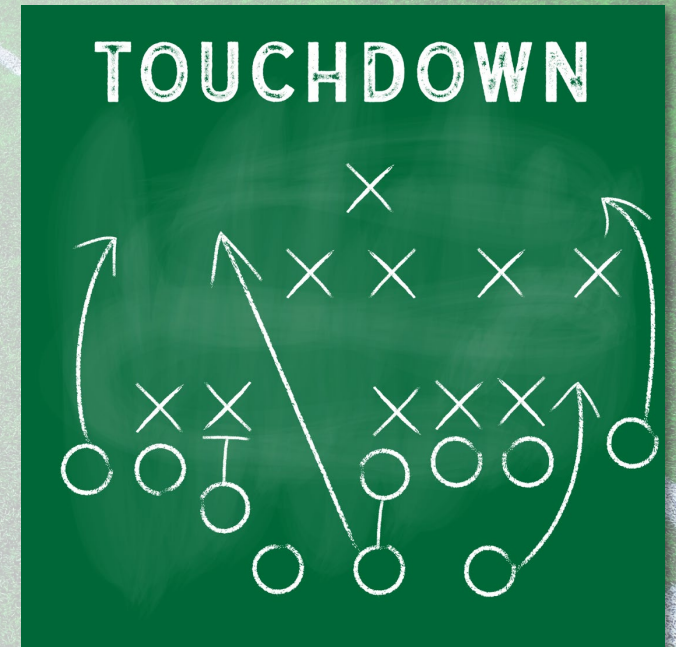


Tip #4 | Build your proposal in layers (cont'd)



Final layer (Communications)

- Easy to evaluate
- Communicates visually
- Is well-written
- Especially important in the digital age
- Outcome – a high-scoring proposal



Tip #5 | Put your proposal effort where it matters

- Focus on the parts that will be scored
- Stop discussing win themes and call them **strengths**
- Use executive summaries to showcase strengths
- Stop polishing the text when it can't get a higher score
- Increase the number and quantity of strengths across all evaluated criteria

Tip #6 | Review proposals like your customer

- Build a compliance matrix
- Build a scorecard using the evaluation criteria
- Review for compliance and score the proposal using the scorecard
- Brief scores to the solution and writing team
- Use review teams to audit for compliance and score the proposal



Tip #6 | Sample scorecard description

		Comments				
Standard		Strengths	Weaknesses*	Deficiencies	Risks	Notes
FACTOR 3: MANAGEMENT APPROACH Factors						
Strategy for the effective management of PWS tasks	M.2.1, L.2.1, C.2.1	2	1			
A flexible approach that facilitates responses to changing task priorities	M.2.2, L.2.2, C.2.2	2			1	
Feasibility and comprehensiveness of the proposed Project Management and Transition Plans	M.2.3, L.2.3, C.2.3	0	1 (significant)		1	
Qualifications of proposed key personnel as presented in submitted resumes and to satisfy the labor category requirements	M.2.4, L.2.4, G.1.1	3			1	

*Note if the weaknesses are just *weaknesses* or *significant weaknesses*

Tip #7 | Make your proposal easy to evaluate

- Build your proposal evaluation worksheet
- Structure the proposal to cross-walk to the evaluation criteria
- All proposal section headers reference instructions and evaluation criteria sections
 - Example: 3.2 Management Approach (L.2.2, M.4.2)
- Showcase strengths in the introductions to major sections
- Present strengths in sections where they will be scored
- Record all strengths in your evaluation worksheet
- Score each section just as your evaluator will do

Tip #7 | Make it easy to score example

1.1 Understanding (L.1, M.1, C.1) ←

Organize the proposal headings by the RFP instructions and evaluation criteria

1.1.1 Understanding of Project Objectives (C.1.1)

The size, scope, and complexity of Project ABC's objectives include.....

1.1.2 Understanding of Project Requirements (C.1.2)

1.1.3 Understanding of Risks (C.1.3)

1.2 Staff Retention (L.2, M.2, G.1) ←

Restate keywords from the RFP in the text

1.3 Key Personnel Qualifications (L.3, M.3)

1.4 Staffing Plan (L.4, M.4)

1.5 Transition Plan (C.3, L.5, M.5) ←

Reference RFP elements in the headings.
Use icons as needed.

Tip #8 | Communicate your message visually

- Use visual communications to display strengths
- Communicate your message for visual evaluators
- Make your strengths pop off the page
- Use the sleepy evaluator test



Tip #8 | Good visual communications techniques

Good visual communications techniques to highlight strengths include placing strengths in:

- Cherry boxes in major introductions to each section
- Tables
- Text boxes
- Shaded areas
- Bolded or highlighted words
- Graphics
- Actions captions below graphics
- Icons



Cherry boxes in major introductions to each section

Duis autem vel	PP 1	PP 2	PP 3	PP 4	PP 5	PP 6	PP 7	PP 8
Compliant Structure	●	●	◐	●	●	●	●	●
Responsive Content	●	●	○	●	●	●	●	◐
Customer Focused	●	●	●	●	◐	●	●	●
Compelling and Feature Rich	●	●	●	●	●	●	◐	●
Easy to Evaluate	●	●	●	●	●	●	●	●
Visual Communications	●	●	●	○	●	●	●	○
Well Written	●	○	●	●	●	●	●	●

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Text boxes, shaded areas, bolded or highlighted words

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Graphics and action captions below graphics

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Icons



Compliant Structure

Proposal is compliant with the instructions, evaluation criteria, and SOW



Responsive Content

Each proposal section fully addresses what the RFP requires



Customer Focused

Emphasis is on the customer, not the bidder



Compelling and Feature Rich

Proposal includes features and benefits with substantiating proofs that are apparent as strengths

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Tip #9 | Establish a standard of excellence

Lohfeld Consulting's 7-Point Standard of Excellence for Proposals

Steps from
good to great
proposals



Compliant Structure

Proposal is compliant with the instructions, evaluation criteria, and SOW



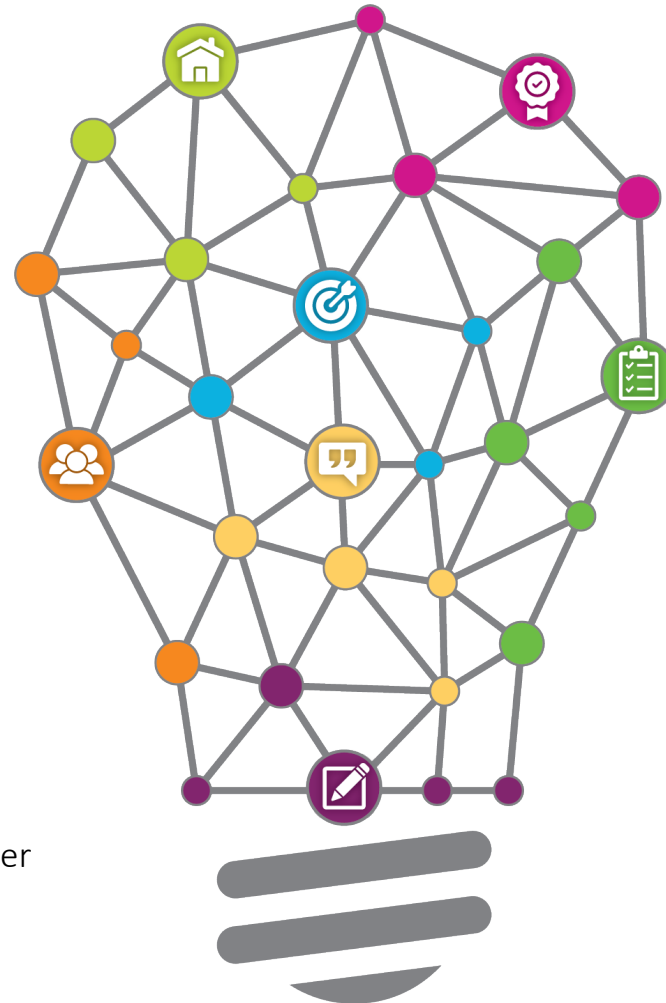
Responsive Content

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Proposal includes features and benefits with substantiating proofs that are apparent as strengths



Easy to Evaluate

Evaluators can easily score the proposal because it includes cross references and maps back to the evaluation criteria



Visual Communications

Proposal is attractive and uses dynamic graphics, icons, and tables to highlight features and benefits



Well Written

Proposal uses active voice, maintains a consistent tense and conventions, and avoids vague or empty words as well as unsubstantiated "bragging"

Tip #9 | Quality Measure – Well Written

Well-written text enables any evaluator to identify and understand the strengths of your proposal

CONCISE **SPECIFIC** **ONE VOICE**
SUBSTANTIATED
EASILY UNDERSTOOD
MEASURABLE **CLEAR** **ENOUGH DETAIL**
DIRECT

Tip #10 | Improve your lessons-learned process

- Raise the importance of lessons-learned exercises
- Two lessons-learned exercises
 1. After proposal delivery
 2. After award debrief
- Lessons learned covers the full pursuit (BD, Capture, Proposal, Q&A, FPR)
- Compare lessons learned to your business acquisition process and make immediate adjustments
- Review lessons learned prior to your next pursuit
- Maintain statistics and use them to improve continually

Tip #10 | Sample questions to ask during lessons learned

- What did we do well?
- Did we do a good job of influencing the customer?
- Was the RFP what we expected?
- Could we have improved our proposal score? How?
- What did we learn about how the customer scores proposals?
- Did we have a solution that exceeded customer requirements?
- What did we learn about our competitors?
- Did we exceed the B&P budget? How might we save money in the future?
- How could we increase efficiency by improving our capture and proposal processes?

Questions?



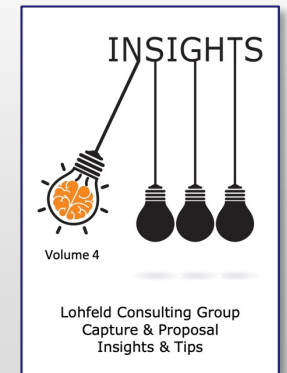
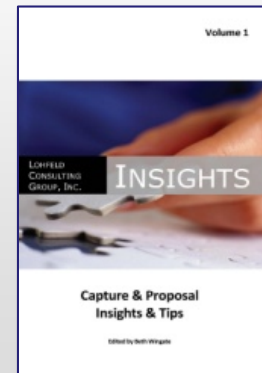
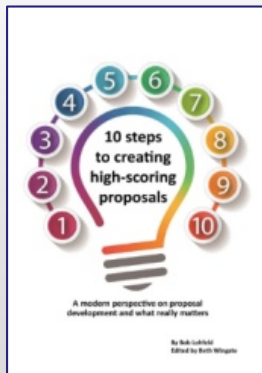
About Lohfeld Consulting Group

- Proposal management, writing, graphics, and DTP
- Capture management and coaching
- Capture and proposal reviews
- Orals support and coaching
- Capture and proposal process consulting
- Capture, proposal, and orals training

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Premier capture and proposal services consulting firm focused exclusively on government markets



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