

## Bid and Proposal Management

### Facilitating Winning Proposals

Fergal McGovern, Founder, VisibleThread

Audience: Business Development Leads, Capture Managers, Program Managers, Proposal Managers

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#### *INTRODUCTION*

A proposal package can be the difference between winning a major government contract and sitting on the sidelines after losing to a competitor. Government integrators certainly understand the importance of a strong response but are limited by several factors.

Creating a quality-tested, comprehensive, and well-written proposal response, coordinating multiple stakeholders and delivering in a very tight timeframe, often 30-days, is no easy feat considering the complexity of most requests for proposals (RFPs). The current manual process involves writing, reviewing and document assembly. It is an exercise in document production, rather than a true test of best available capability.

The bid process for contractors planning to do business with the federal government is extremely challenging due to the lengthy and intricate procurement process. While technology exists to streamline this effort, a uniform best practice solution has yet to be adopted. There has to be a better way!

#### *BUSINESS DEVELOPMENT CHALLENGES WITH THE BID PROCESS*

Business development teams are constrained by two factors; their ability to respond to a higher number of bid requests and secondly assuring an increased probability of win for each bid response submission. Multiple factors lead to these constraints.

- Integrators fish through a series of websites, contacts, and announcements to learn of upcoming opportunities.
- Capability requests are posted in an assortment of document structure and file formats and drafted by a diverse set of organizations and authors.
- References to task orders, statements of work (SOW), specifications, schedules, and policies create a complicated web of documentation.
- Communication with the filing government agency is restricted during the response period testing the integrator's ability to ingest, analyze, translate, and comprehend the capability request.
- High quality bids are the result of extraordinary effort.

#### *CAPTURE AND PROPOSAL MANAGERS CHALLENGES WITH THE BID PROCESS*

Once a decision has been made to pursue an opportunity, capture and proposal managers are deployed, they are constrained by the challenge of coordinating and managing inputs from multiple subject matter expert (SME) stakeholders and the severe time crunch nature of the response process, typically 30 days. The manual process complicates these challenges.

- Portions or in some cases the entire bid is outsourced to external writing shops creating further collaboration challenges and adding substantial cost.

- Capture managers gather requirements and provide oversight to this manual and arduous process without the benefit of traceability and content awareness tools.
- Requirements gathering and consolidating is a time-consuming and onerous effort that often introduces errors.
- SMEs from multiple organizations are recruited for their perspective and each adds their own voice and style of writing.
- Red and Gold Team reviewers serve as a check and balance to ensure document traceability as this becomes a major integration effort. Often the red team is pressured with a short turnaround.
- Traceability is required with external reference documentation content as well as within the bid itself, which for large efforts may be thousands of pages with multiple schedules and appendices.

Bid preparation has become an art. Typically the same sets of individuals are called upon thereby limiting the breadth of responses or overloading the few. While Content Management systems are sometimes used, they provide limited insight into the actual content compliance internal to the documents.

## **BUSINESS OBJECTIVES FOR A STRONG PROPOSAL RESPONSE PROCESS**

At the highest level, the business objectives are to increase the bid response rate and increase the probability of win for each bid response submission. Meeting these objectives requires strict adherence to the following principles.

- Increase the number of processed proposals by reducing time spent for key contributor resources such as authors and red team reviewers.
- Increase the probability of win for every proposal response by increasing the quality of content within each submitted document, including tech volumes.
- Synthesize a response that ensures all requirements are satisfied, quantified, priced, documented, and served back to the government to be evaluated against pre-established criteria.
- Ensure all capabilities described within a proposal map to each requirement within the bid request and/or SOW. Correlate pricing to capabilities and evaluation criteria throughout all stages of the authoring and review process.
- Include tight, non-fuzzy language with concrete and measurable outcomes presented in the same style and voice.
- Ensure consistency of response structure across all submitted documents.
- Ensure structural compliance with the RFP and its many and various requirements.

## **BUSINESS COST**

The current process is a costly endeavor with very high stakes. Contractors spend millions of dollars on outsourced and internal manpower to put their “best foot forward” in responding to these RFPs with no guarantee of success.

It is quite possible for a contractor to be eliminated from consideration should a major capability or requirement be neglected. A high price to pay, should an editing or documentation error be the cause of such lost opportunities.

Common errors often lead to failed attempts to secure business, degraded reputation, and rework. These errors include: lack of traceability, loose language, weak requirements, absence of concept coverage for given sections, lack of consistent structure and inconsistent writing style and voice. There has to be a way forward to avoid such a risk.

## SOLUTION

Can technology help? Would a Bid Compliance Tool fit the bill? It certainly should be part of the answer. Gains in efficiency will expose integrators to more opportunities and the addition of traceability and defect detection will lead to greater success rates. Lets consider the capabilities needed for a best practice software solution.

**Best Practice Category**

- 1. PURPOSE Pass
- 1.1 SATCOM-II OVERVIEW Pass
- 2. CONTRACT INFORMATION AND GENERAL GUIDANCE Pass
- 2.1 Contract Characteristics Pass
- 2.2 Authorized Contract Users Pass
- 2.3 DOL Wage Determination Pass
- 2.4 Travel Pass
- Government Contracting Officer Responsibilities Pass
- Ordering Options Pass
- 3. ORDERING PROCESS Partial
- 3.1 Direct Order/Direct Bill Partial
- GSA eBuyer Fail
- Contractor Responses Pass
- 3.1.1 Direct Order/Direct Bill Ordering Examples Pass
- 3.2 GSA Assisted Ordering/Billing Pass
- GSA Assisted Ordering/Billing Example Pass
- 4. CUSTOMER REPORTING REQUIREMENTS Pass

**Bid Compliance Requirements**

Weighting	Status	Count	Check
Technical Te	Medium	89	<input type="checkbox"/>
erbs Req.	Medium	20	<input checked="" type="checkbox"/>
		1	<input type="checkbox"/>
		1	<input type="checkbox"/>
		3	<input type="checkbox"/>
		3	<input type="checkbox"/>
		2	<input type="checkbox"/>
		5	<input type="checkbox"/>
		1	<input type="checkbox"/>
		19	<input type="checkbox"/>

**Document Level**

- Compatibility
- Structure Management
- Traceability
- Pass / Fail Criteria
- Defect / Fault Detection
- User Collaboration
- Quality Metrics
- Multiple Views

**Content Level**

- Content Management
- Template Construction
- Traceability
- Pass / Fail Criteria
- Defect / Fault Detection
- Compliance Tracking
- Quality Metrics
- Usability

## **COMPATIBILITY WITH EXISTING FILE FORMATS**

Implementation within existing applications such as MS Office and Adobe Acrobat is a must. Forcing people to transfer specific content into proprietary formats and structures is not the answer. Flexibility to use native documents of various file formats like MS Word for analysis, editing, drafting, and tracking. Automatically generated requirements documents based on the imported RFP content.

## **TRACEABILITY AND COMPLIANCE**

Internal and cross-document traceability is required to map proposal internals to reference documentation, schedules, and appendices. This is important to ensure that all aspects of the RFPs requirements are answered, quantified and priced. Automated compliance checks should be made via the system and visibility delivered through a dashboard to ensure all aspects of the response are complete prior to submission. Concepts and how they are referenced should be visually brought to the users attention to assure consistency across documents.

## **FAULT AND DEFECT DETECTION**

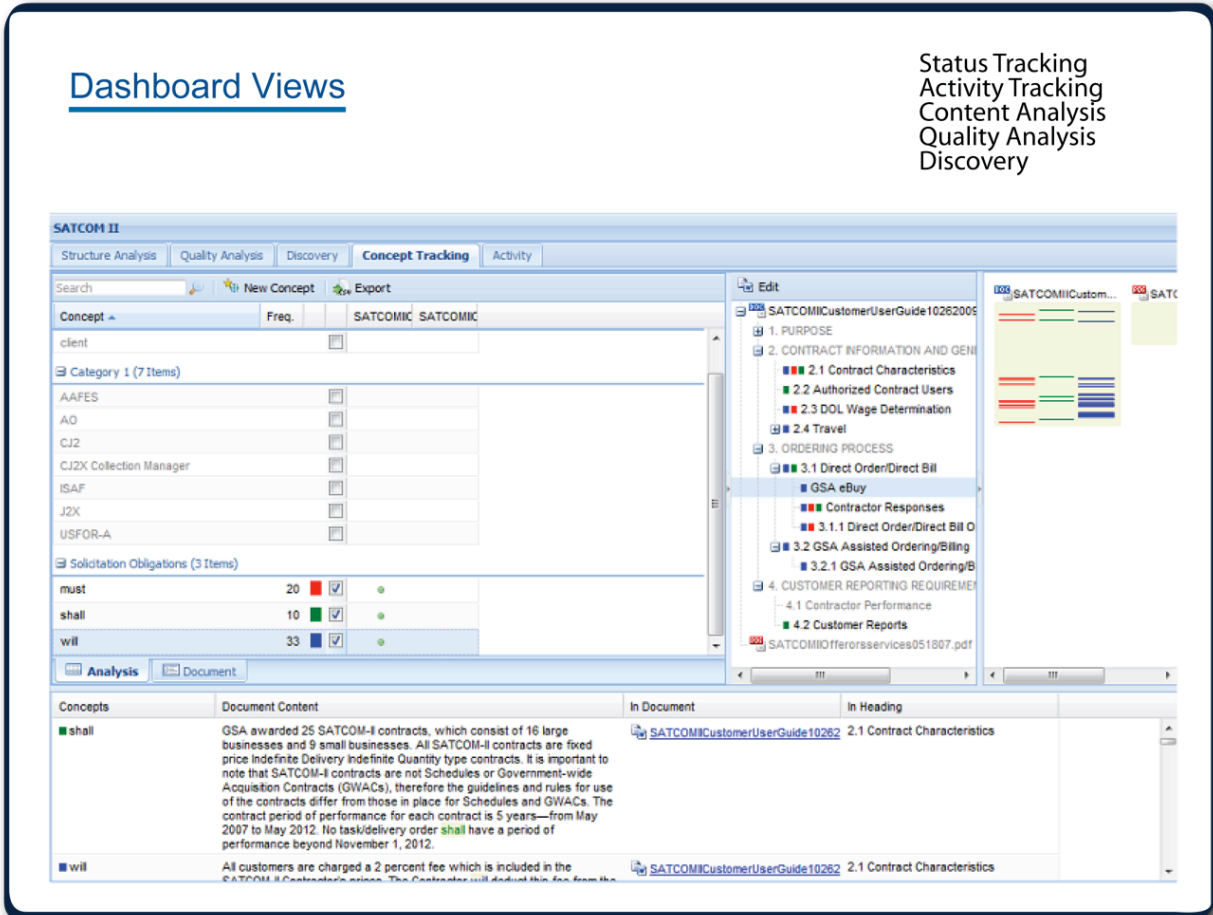
The use of templates for similar proposal responses would be valuable. A product-based response may have a different template than a service-based response. Industry specific templates may be of use. The tool should check for document structural faults such as incomplete and/or missing sections against a template and the requirements pulled from the RFP. In addition, the system should look for loose language defects such as the use of vague terminology and inconsistencies.

## **COLLABORATION AND FILE SHARING**

Web access is required to support both teams and individuals performing sequential reviews. Review and document tracking will provide a status of where the proposal is within the response process. The typical tracking change features should be implemented with the ability to add comments and share notes with reviewers and authors not just at file level but right down to the individual heading or section.

## **MORE THAN JUST DOCUMENT MANAGEMENT**

A file-level document management solution on its own is not the answer. Capture managers seek a tool that works inside the document, scanning the content to identify specific sections and comparing requirements, language, and structure across the collection of response documents. Visualization should be at the core of the product for reviewers and authors to quickly identify defects, inconsistencies, and risk and compliance areas. Providing a top-down, inside-out approach to content management is the methodology that would be most impactful and beneficial for automating the process. Any solution would ideally need to integrate with current in-house document management solutions such as Microsoft SharePoint if already deployed.



## REALIZING BENEFITS – BUSINESS DEVELOPMENT AND PROJECT STAKEHOLDERS

The decision behind any technology investment is driven directly by profitability resulting from the potential for growth in revenue or cost reduction.

- Streamlining the process with a bid compliance tool will reduce the manual effort required to prepare a bid, freeing up valuable resources and increasing pursuit opportunities.
- Using a web-based application will provide greater agility and access to a broader range of subject matter experts.
- Government agency interaction will be more productive as requests for clarifications will be consolidated and de-conflicted across documents.
- Having greater visibility of defects, faults, and traceability through the dashboard will reduce the risk of opportunity loss due to error.
- Higher quality, defect tested, responses will improve integrator reputation and increase probability for contract award.

If implemented and deployed properly, a bid compliance tool will deliver significant savings, efficiencies, and improvements to the proposal response process. The end result of course will be a higher quality response submission, which translates to a higher probability of being awarded business.