

EXECUTIVE BRIEF

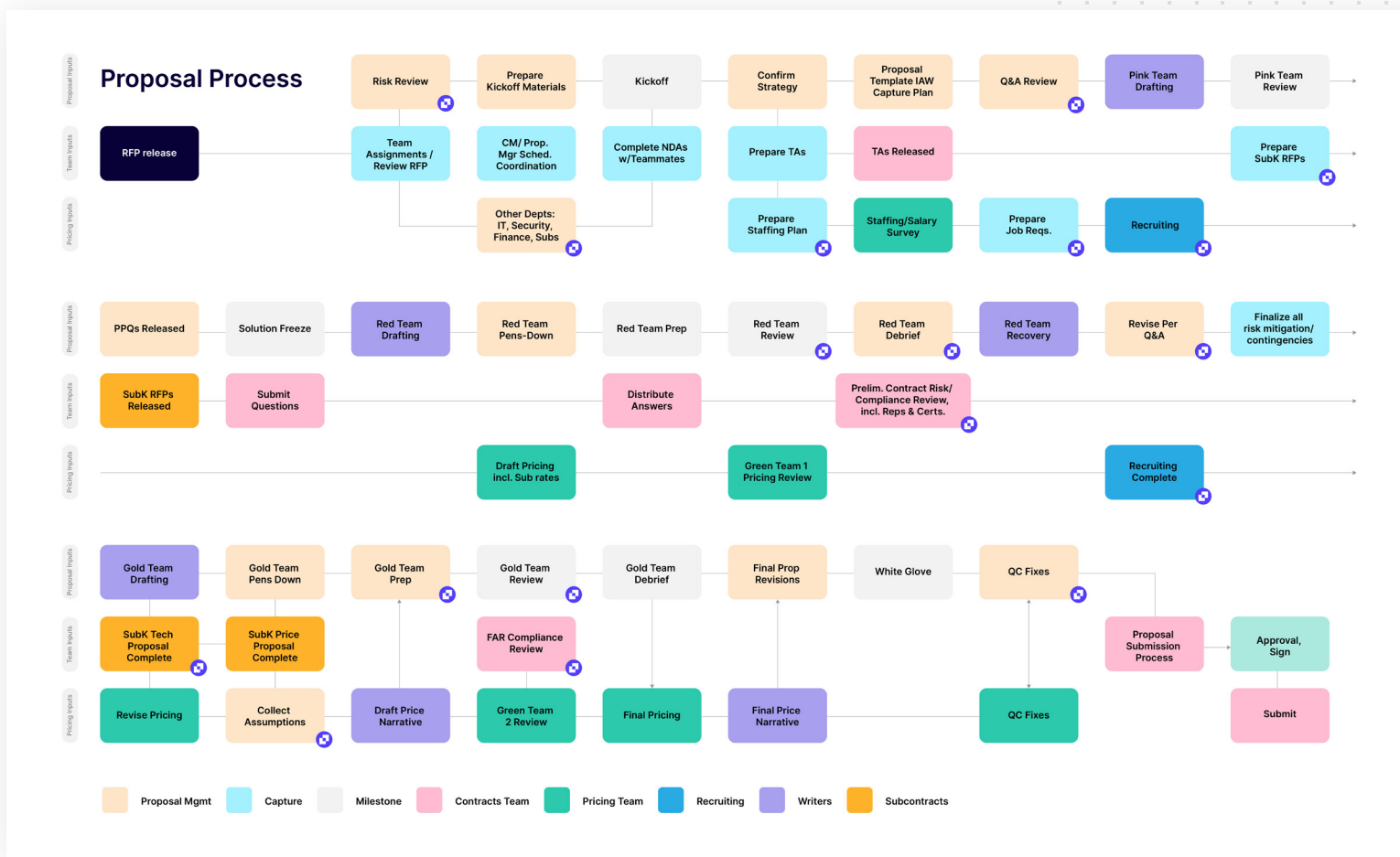
Strategies for successful proposal management

5 key takeaways for streamlining your proposal process.



Cherokee Federal: Strategies for successful proposal management

Cherokee Federal uses a thoughtful and systematic approach to proposal management. [In their recent webinar with VisibleThread](#), they shared some of their best practices for successful proposal management. This talk highlighted how Cherokee Federal integrate VisibleThread at key points to streamline their process. Below are some of the key takeaways from this session.





1. Your proposal department is a value driver

There can be a tendency to view growing proposal departments as a cost center rather than a value driver. Scaling your proposal team is an investment, not an expense. If you look at your proposal department as an investment, you'll produce a Return on Investment (ROI). But if you view it as an expense, you're going to feel like you're spending money. This couldn't be further from the truth: you're earning money with every proposal you win.

Cherokee Federal is a division of Cherokee Nation Businesses—the board-governed holding company wholly owned by Cherokee Nation. Between the tribe and its business units, the organization employs more than 11,800 people worldwide.

The tribe and its businesses have an economic impact of \$2.16 billion on Northeast Oklahoma. One hundred percent of Cherokee Federal's profits help support job and business growth and help fund critical services for the tribe, including health care, education, and veterans' programs.

As Senior Director of Proposal Operations, Marcia Watson takes a big picture overview of Cherokee Federal, "We are an expansive and expanding organization—Cherokee Federal—that's the brand that we represent ourselves under, but each one of our individual companies carries its own past performance, prepares its own proposals and runs through all of its contracts management as an individual entity."

2. Reduce manual processes to focus on critical processes

A standard Compliance Matrix often takes hours to create, depending on the size of the RFP. Cutting and pasting requirements from the solicitation documents into a spreadsheet is time-consuming and tedious. Using VisibleThread allows teams to save time that would have been spent compiling requirements. Now, the proposal manager can focus on value-add activities like understanding requirements and mitigating risk. This leads to better proposals, less strained proposal teams, and increased Pwin for individual opportunities.

Proposal Manager, Mona Lee, says, "What I have found is that by using VisibleThread, I allow myself more time and *better-quality* time for the thinking parts of proposal

"One of the tools that VisibleThread provides is the ability to find long sentences and passive voice. Doing a shred for those before a review is incredibly helpful & quite a time-saver when we are under a tight deadline. It does it so quickly and highlights the sentences that are long and if they're written in passive voice—allowing us to focus on other more critical items."



response. Instead of spending a day breaking out a compliance matrix, I can spend one hour on it. This gives me back valuable time to ensure that my team has a clear understanding of their area of responsibility for a response.”

Cherokee incorporates VisibleThread at critical points in their proposal process to glean information and to guide their decision-making process. Now, they can qualify bids and move them through the proposal process with greater ease to bring in the opportunities with the best chance of a win.

3. Reduce Risk by integrating VT Docs into your process

If you're not solving the customer's problem, you're not giving them anything worth purchasing. Using a risk dictionary keeps proposal responses compliant and help you perform efficient concept tracking and reviews.

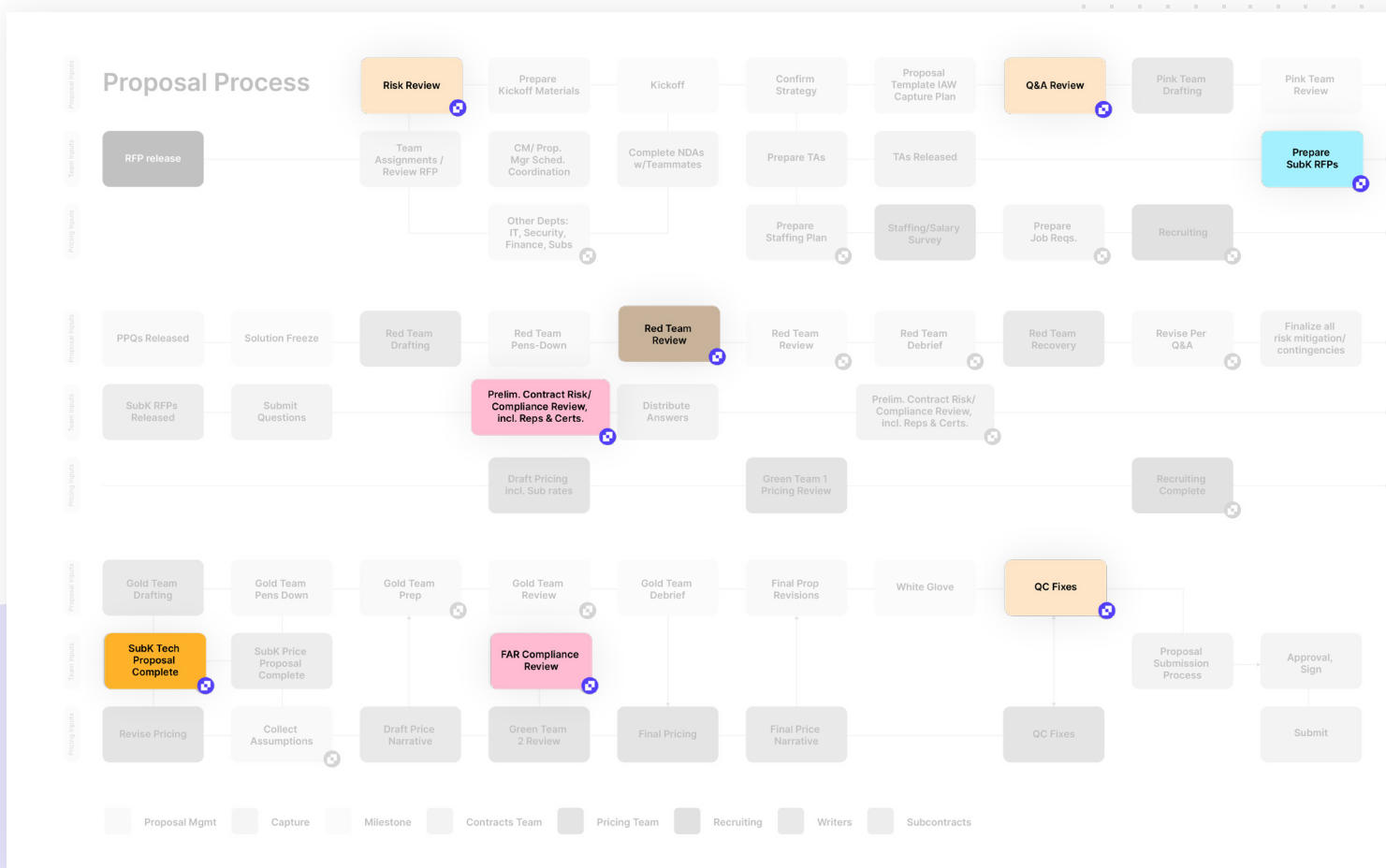


Image: Diagram shows the integration of VisibleThread at key points of the Cherokee Federal proposal process



Cherokee uses a risk dictionary in [VT Docs](#) to check for potential compliance issues. It also helps the team to ensure they've covered the critical concepts to their customer during the Red Team review.

When preparing subcontractor RFPs, Cherokee uses concept tracking in the FAR review process. For preliminary risk and compliance, they've saved valuable time by running a compliance matrix in minutes—sparing them hours of manual work. Cherokee uses VisibleThread to generate a responsibility matrix to draft subcontractor RFPs more efficiently. Before release, they perform final checks for potential Quality Control (QC) fixes—identifying and correcting readability, bad language, and acronyms.

Mona observes, "VisibleThread enables you to run each section against the concept, bad language and style dictionaries. It allows you to ensure that all your parts of the presentation are compatible and comparable."

[Building your dictionaries is an invaluable yet simple way to improve the quality of your proposals. Risk dictionaries can help you to quickly identify particular intellectual property \(e.g. data rights assertions\) or security terms.](#)



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your own custom
dictionaries today.**

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4. Analyze past performance analysis to improve your win rate

It can be helpful to analyze past performance if your capture or business development team brings you a response. Using a tool like VisibleThread to analyze your work provides an efficient way to learn from previous failings or repurpose content from winning bids.

As a department director, Marcia looks for best practices and opportunities for improvement, reusing of materials, streamlining activities, and taking advantage of convenience whenever possible. "Our best written materials are what's going to win for us the next time around. How we use lessons learned from our proposal practices drives decision-making for the next opportunities."

Cherokee uses lessons learned from previous performance in training for continuous improvement (not just in their proposal process). This helps grow the skills of the people who support their proposal process.



Marcia observes, “If you’re looking at an opportunity, and you’re not thinking that it has the Pwin, or you’re not thinking you have the appropriate resources to go after it. It is always your best investment to walk away. So that’s one of the things that we promote here at Cherokee: use your tools to help you make a decision on whether an opportunity is worth that pursuit.”

Using your past proposal library, you can identify relevant, reusable content by similarity of customer, deliverable, or contract type. [By performing a gap analysis on relevant proposals through VisibleThread against a current RFP](#), you can identify the proposals that are most useful. Your team can draw on this content for your latest response and repurpose relevant snippets in a more targeted manner.

5. Automate to support proposal managers

Automating labor-intensive parts of the proposal process is a big win and gives your proposal manager back valuable time to focus on content. It’s important to note that this doesn’t take away from the value of a proposal manager. It enhances the processes and quality of what they need to review. This empowers the proposal manager to be more strategic in how they move through the tasks that VisibleThread highlights.

It can be challenging for proposal managers to manage pushback. VisibleThread provides objectivity on where you’re not meeting the required standards and how you can fix it. Marcia observes that they’re still learning and adapting their proposal process to integrate VisibleThread at key points.

“The great thing was when we were going through [our trial](#), working with the training team in VisibleThread. We tackled acronyms first—it’s the first thing you’re going to find value in VisibleThread. And it’s valuable for every single proposal. It takes time away from your editors, and it gives you time back to improve the proposal response overall. We then expanded into dictionaries and compliance matrices to transition more manual processes to VisibleThread.”

Cherokee Federal is expanding the capabilities of VisibleThread across its enterprise. When hiring, their recruitment team compares requirements to examine key personnel resumes to bring value to recruiting team processes.

Marcia observes, “But if we didn’t have all of those resources, I would still use VisibleThread for those functions. Because if you don’t resource doing that job, now you have a tool to supplement it...so, it is very iterative and scalable.”

“You’re not opening up more time so that you can do more proposals. You’re opening up more time, so you can make that proposal better and increase your Pwin for that individual opportunity.”



Grow your business with VisibleThread

At VisibleThread, we work closely with our customers to support their processes and empower them to grow their business. Our Customer Success team works as strategic partners with our customers to understand the context of their work, their processes, and their pain points. Our team advises on strategic integration of VisibleThread to your existing proposal processes and supports you every step of the way—so your company can focus on growth.

If you have any questions, **we'd be delighted to support you.**

Contact Us



Marcia Watson oversees Proposal Operations. This system of people, processes, and technologies supports the 30+ companies that comprise Cherokee Federal, a division of Cherokee Nation Businesses. She leads a nationwide team of proposal managers to support Business Development teams with Capture and Proposal Management best practices.



Mona Lee has over 20 years of experience selling business services and hiring management software. She has been a Proposal Manager at Cherokee Federal – a division of Cherokee Nation Businesses – for four years, primarily in the Defence Health Capability area.

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- Remove ambiguity & confusion
- Ensure compliance by spotting gaps & risks
- Reduce 'scope creep' in RFP/bid responses

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STATS AT A GLANCE

1.1m

Dollars saved per year in
single division

71h

Time saved per proposal
on average

\$1m

Dollars saved per year
For 20 users

85%

Time saved per proposal
on average

