Summary

From Silos to Synergy: Maximizing Success Through Collaboration

Emphasizing the importance of cross-functional collaborations. What should these collaborations entail?

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Summary Outline

We tackle it all. From placing proposals at the centre of organizational structures, to establishing a shared understanding of opportunities. Here's an outline of what you can expect from our summary guide.

Set Up Cross-Functional Teams with an Optimal Mix of Data, Business and Technology Skills

Data Managers

- Data Engineers
- Data Architects
- DBAs
- Daa Stewards

Data Consumers

- Business Analysts
- Data Scientists
- AI Engineers
- BI Developers

Data Product Managers

DevOps Experts

- App Engineers
- Automation Experts
- Test Engineers

Business Stakeholders

VisibleThread's Customer Success lead Kyle Peterson, and President of Entellect LLC, Tan Wilson, drove insightful conversations with a panel of industry professionals on this very matter.

Kyle Peterson
Vice President of Customer Success
VisibleThread

Tan Wilson
President
Entellect LLC

Introductions

Before we talk risk and outline the challenges, let's introduce our panelists.

On Kyle's panel – discussing maximizing success through collaboration in proposals, business development, and capture – we have...

Marcia Watson
Sr. Director of Proposal Operations at Cherokee Federal

Fred VIcheck
Director of Business Development Operations at Pragmatics

Steve Skeldon
Capture Director at Chickasaw Nation Industries

President at Entellect LLC, **Tan Wilson**, hosts our second session. Joining her to discuss Leveraging Teamwork to Win Proposals, Drive Business Development, and Capture Opportunities we have...

Jennifer Adeli
Chief Growth Officer (CGO) at Edgesource Corporation

Stephanie Zink
President at Taurus Group

What does a high-performance team look like?

Tan kicked off proceedings by asking her panel to discuss the key elements of a high-performing team. How can you apply these elements not just to proposals, but across an entire organization?

With over a decade's experience running her proposal management company, WIN BIS Consulting, Jennifer Adeli has invaluable insights. In short, she believes the proposal department should be at the center of an organization's org chart.

Usually, proposals get a small, siloed box in the corner of the chart. They're never front and center. In Jennifer's experience, this can indicate that proposals are someone else's issue. In government contracting, winning contracts is crucial for company growth, and responding to RFPs is essential. Therefore, ALL departments need involvement in the proposal process.

By simply placing proposals at the center of the org chart, teamwork becomes more authentic and organic. It ensures everyone understands the importance of winning contracts. bids. The key to success is strategizing and having a plan.

> **"Proposals get all the blame, they get none of the glory!"**
>
> **Tan Wilson**

As the president of Tourist Group Inc., Stephanie Zinc knows how vital streamlining the entire BizDev lifecycle is. A crucial takeaway she highlights is involving all team members in the proposal response process. This is regardless of their functional area.

By placing proposals at the center, it transpires that everyone has a role to play in winning contracts. To ensure everyone understands their responsibilities with the response document, getting early buy-in from all parties is pivotal. When you involve HR, contracts, subject matter experts, writers, editors, and proposal managers, the team collaborates more authentically.

Director of Business Development Operations at Pragmatics, Fred Vleck, also noted the importance of teeing up the team. Engaging them quickly and appropriately is central to producing a higher-quality product.

The team follows the Shipley method for capture and proposal management, which helps them take a disciplined approach. Using tools and insights during the process helps to build a quality product. It also helps when marketing oneself appropriately to win new business.

> **"I think early engagement of proposals in the capture process, and capture in the BD process, there's a lot of overlap. That's shown in a lot of the Shipley model of the engagement and stakeholder nature of capture and proposals in earlier stages that they aren't necessarily in charge of. We use VisibleThread for risk identification through our tread process."**
>
> **Steve Skeldon**

Risk of pursuing opportunities without buy-in from team contributors

With Kyle always keen to tackle challenges, he highlights the importance of collectively understanding the mission behind each opportunity. This, however, can be tricky in a remote working environment.

Addressing this issue, Kyle stipulates the need for clear communication between all contributors. Having a nuanced comprehension of the opportunity's value is also a plus. Establishing a shared understanding of the mission/purpose of each effort brings alignment. People need to commit to the end goal, and this is only achievable if everyone's along for the ride.

With the "big picture" detailed, the team then adopts ownership over the opportunity. This means they're more likely to invest in the process, thus producing their best work.
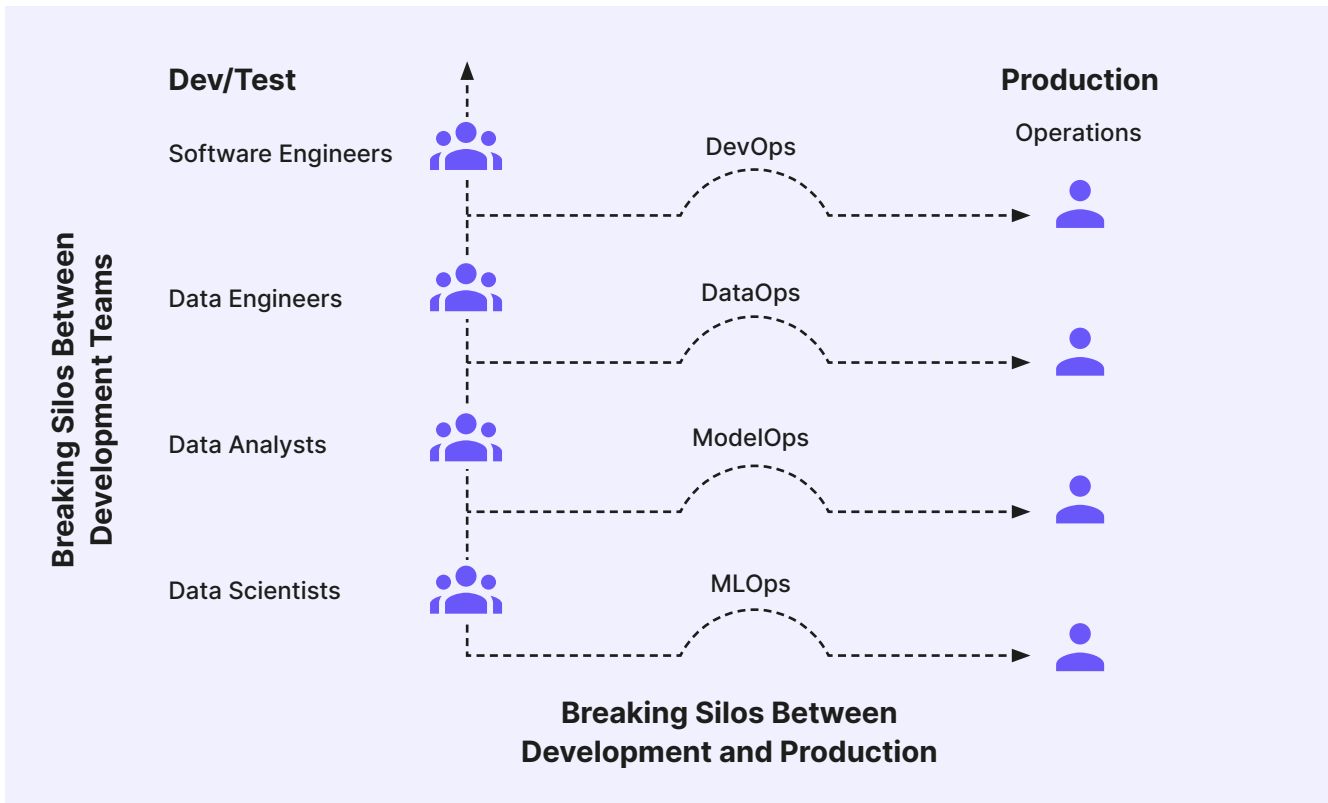
So, what are some of the strategies you can implement to get the ball rolling for better communication?

Fred Vleck has some helpful hints in terms of breaking down silos, such as…

- Effective team communication starts with identifying and sharing core capabilities.

- VisibleThread is a useful tool to deconstruct top-level capabilities into tasks. It can also analyze each word across an RFP or white paper.

- Aligning core capabilities with RFPs, you can generate a heat map to identify opportunities which align with the company's capabilities.

- Use cross-discipline resources to capture these opportunities and achieve buy-in.

Keen to learn more about Fred's heat mapping? It's a powerful tool used to align a company's core capabilities with potential opportunities. For instance, in terms of analyzing each RFP word with company dictionaries, you can automate the process. You can then identify the best potential opportunities. This saves valuable time and resources.

AI tools – including large language models – can help companies compare their existing contracts against entire platforms, like Sam.gov. By doing so, businesses could discover potential customers instead of overlooking them. Automation systems, like Power Automate and Zapier, are also critical for businesses to stay ahead of the curve. Failure to do so may result in losing opportunities to competitors who have already leveraged these tools.

Breaking Silos Between Development Teams

Dev/Test — Software Engineers → DevOps → Operations (Production)
Data Engineers → DataOps
Data Analysts → ModelOps
Data Scientists → MLOps

Breaking Silos Between Development and Production

Marcia Watson, Sr. Director of Proposal Operations at Cherokee Federal, also discusses the importance of integrating different organizational departments. For example, integrating recruiting and IT into the proposal process early ensures better preparedness for resource and capability needs.

Such preparedness helps eliminate risk and potentially lead to earlier no-bid decisions. Marcia also highlights the importance of pinpointing missing capabilities, then using that knowledge to strategically grow in the market. She praises the philosophy of integrating different perspectives to achieve a fine focus in BizDev, proposals, and capture.

> "Ultimately, what I'm hearing is its alignment. It's alignment between an organization as a whole. What it can deliver against the opportunities that it may, or may not, want… It's being able to flag key portions of these RFP's, to share downstream with our solutioning teams early. We never have enough time, and we never will. However, if we can give our proposal management team an additional two weeks of runway – wow! What a difference that might make."
>
> Kyle Peterson

How do we put proposals at the center?

Jennifer states that the success of a proposal effort needs two things: clear leadership and a shift in organizational structure.

Throughout the process, the Proposal Manager is the ship's captain, with executives and other leaders taking direction from them. Why is this shift in power necessary? Because the traditional hierarchical org chart does not accurately outline the proposal phase. It's about leadership empowering and supporting the proposal team to achieve success. Executives need to clarify that the Proposal Team is at the center of the effort – even if this isn't the case in day-to-day operations.

Stephanie, meanwhile, believes that senior leaders should have some involvement in project initiation. This initial engagement is to make sure everyone comprehends the importance of the effort. Then, after the kickoff, the more hands-off approach needs adopting.

Autonomy and authority then belong to the proposal or capture manager. This way, they can direct resources, including the C-suite team. To improve processes, senior leadership oversee those aspects throughout the process – via an RCI matrix or liaising directly. Additionally, senior leadership need involvement across lessons learned or AARs (After Action Report). They can help identify weaknesses, opportunities, or areas requiring additional resources. This drives change for the process, creating an efficient team overall.

Early Engagement: Uniting Proposal and BD Teams

Smaller organizations may find it easier to keep everyone abreast of what's going on. However, scalability can become an issue as businesses grow. There needs to be a well-developed and planned environment established. Having the right people at the table for those critical conversations is key for collaborative success.

However, the decision-making process often only takes place at a high level. This can result in the dismissal of critical input from project managers or functional experts by Business Development. This is where the importance of diversity and inclusion in teams comes into play, as Tan emphasizes. There are merits to consultants being there to ask the tough questions, grounding BizDev in the process.

According to Jennifer, involving proposal management with BizDev early in the bid process is intrinsic to building team transparency. Proposal managers should work with business development and ops to gather information across a number of facets. These include requirements; teaming partners; past performances; key personnel; among others.

Such information helps to inform the bid decision and prevent last-minute hiccups. The proposal manager should focus on section L of the instructions. BizDev and ops, meanwhile, should look at the statement of work and valuation criteria. Even a small increase in trust between teams can have a significant impact on bid process success.

Stephanie also emphasizes the importance of early engagement with functional team members before the RFP is issued. By bringing the proposal team into pipeline discussions and identifying must-wins, adequate resources are allocated accordingly. This further fuels success while maintaining balance.

Prioritization challenges in the proposal process

Not only do you have to deal with scheduling and resourcing, but also morale challenges. There never seems to be enough time to do everything. So, outlining priorities is an imperative aspect of the proposal process. That said, it's not just about having the right resources to pursue opportunities. It's about bidding on the right opportunities. How can you overcome these challenges and know when to bring in consultants or hire more people? It's a delicate balance.

Jennifer highlights the unique skillset that a successful proposal manager/writer possesses. For starters, they need to be both left-brained and right-brained. This combination of creativity alongside a structured, deadline-driven mindset is key for success.

Many companies won't have someone with this skillset in-house. In which case, outsourcing proposal management can be a great business decision. Jennifer offers three specific ways that companies can benefit from outside support in the proposal process.

- Firstly, companies can hire an outside consultant to help them with compliance. This involves analyzing the request for proposal (RFP), building a compliance matrix, and setting up proposal templates. As this step only requires a modest budget, consider it money well spent.

- Companies can bring in an outside consultant as a red team reviewer. This involves having the consultant review the proposal before providing pivotal feedback. This outside perspective is important for small companies where only a few executives touch proposal.

- Finally, companies can pay an outside consultant for a final compliance check at the end of the proposal process. This ensures all the requirements are met and that the necessary attachments are present.

By outsourcing these above, companies can focus on the product. This increases their chances of proposal process.

> "Money is well spent on things where you can have someone focus on the compliance element. We do this all the time. We come in at the beginning, we outline, we shred, we give you everything. Then, we come back at red and then we come back and finish it off for you. That's a really effective way of using a consultant"
>
> **Tan Wilson**

What role does feedback play in the process?

Stephanie emphasizes the need for proposal managers to ask hard questions of BizDev and capture. This builds a strong proposal strategy. Informed by a good capture strategy, proposal managers should feel empowered to be the dissenting voice in the room. Why? Because they often have valuable insights into potential red flags and minefields in the proposal process.

Stephanie also stresses the importance of providing feedback to senior executives and the marketing team. This improves the organization's future pursuit of contracts. Below are some of her leading insights.

- Proposal managers need to work internally with their resources to determine who should lead volumes and contribute to the development process.

- Don't rush to write a proposal without understanding the solicitation. Plan thoughtfully.

- Proposal manager's role is to ask hard questions of business development and capture

- Proposal process starts with big C, little p (capture-driven) and eventually flips to big P, little c (proposal-driven)

- Proposal professionals need to feel empowered to be the descending voice in the room and bring objectivity to discussions.

- A feedback loop within proposals is important. It helps determine how successful they've been and how to progress on the front end.

Key Takeaways

Our findings and discussions on the Optimize23 sessions confirm that leadership plays a key role in successful collaborations. From proposals on org charts to early involvement, it's evident that leadership shapes the narrative.

Here's our recap!

✅ **Prioritize proposals on Org Charts.** By placing proposals at the center of the org chart, teamwork becomes more organic. It ensures everyone understands the importance of winning contracts.

✅ **Early engagement between Proposal and BD teams.** Even if there are only one or two people on the team, it's vital to collate information early on to ensure a smooth proposal process.

✅ **Leadership matters.** When it comes to emphasizing the need to prioritize proposal management, Tan highlights the role of leadership in setting the tone. Company leaders need to set expectations while understanding resource allocation to ensure a healthy work environment. They also need to make decisions regarding AI, clearly defining its role within the process.

✅ **Clear communication, from the top down.** Focusing on the bigger picture and long-term goals facilitates companies to position themselves as major market players.

✅ **Know your niche.** Never underestimate the importance of "niching down." Identifying your company's core opportunities is key. Really focusing on what you do, and who you serve, is always a ticket to success.

In terms of pinpointing the most critical aspect of successful proposal management? We conducted a survey specifically focused on this matter. The results revealed that collaboration stands as the paramount factor. This finding underscores the prominent position collaboration holds in the minds of proposal management professionals.

What's the most critical aspect of successful proposal management?

315 Votes

Effective Collaboration	45%
Understanding Requirements	34%
Project management skills	17%
Compelling Writing	4%

We hope you'll agree that our roundtable discussions at Optimize23 brought clarity on the power of collaboration in the proposal, business development, and capture process. For yet more insights into collaboration across proposal management, you can view the full sessions here.

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