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Executive Summary

From Vision to Victory: The Ultimate Proposal Management Process

In today's uncertain world, consistent, repeatable processes drive business success, fostering efficiency, best practices, and growth.

VisibleThread.com

Contents

Introduction

Our latest gem from Optimize23 sees Alison Ritz, Enterprise Account Exec at VisibleThread, host a transformational webinar on the proposal process. Joining her were Amy McGeady (Senior VP of Strategic Services), and Kelson Forsgren (VP of Program Development).
They discussed proven optimization strategies employed by Shipley Associates.

Our guide, with expert contributions from Amy McGeady, dives into Shipley's transformative proposal optimization techniques.

🔊 You can view the full Optimize23 session here

Introducing our speakers

Alison Ritz
Enterprise Account Exec
VisibleThread

in **Linkedin Profile**

Amy McGeady
Senior VP of Strategic Services
Shipley Associates

in **Linkedin Profile**

Kelson Forsgren
VP of Program Development
Shipley Associates

in **Linkedin Profile**

About Shipley Associates

Shipley Associates is a highly successful proposal consulting firm. They help countless clients win more business via range of tools, templates, and key methodologies shared in training courses and by consultants working with clients across the world. The Shipley Method is their proposal management process designed to help organizations create winning proposals. How? By providing a systematic and repeatable approach to the proposal development process.

Overview of Shipley's Business Winning Lifecycle

For starters, Amy and Kelson want to ground you in Shipley's Business Winning Lifecycle.

🔊   Kelson provides a brief overview of the phases from 2 minutes

Before diving into Proposal Planning and Proposal Development Activities, you must first address Phases 0-3.

Quick Overview - Business Winning Lifecycle

Phase 0	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
Market Segmentation	Long-Term Positioning	Customer & Opportunity Assessment	Capture Planning	Proposal Planning	Bid & Proposal Development	Post-Proposal Activity

> **"Do we understand who we're bidding to as far as the customer's concerned, and what their issues are? Not just the ones that may have come in a Request for Proposal or Request for Tender, but do our sales teams interact with our customers? Do they know the kinds of things the customer's trying to resolve and solve?"**
>
> **Kelson Forsgren**

0. **Market Segmentation:** This is the foundational phase of the Shipley Method. Phase 0 encourages you to understand the market segments your organization competes in and identify the target market for the specific opportunity.

1. **Long-Term Positioning:** Defining and understanding your customer to nail the long-term positioning. Here you align your organization's capabilities, strengths, and goals with the identified market opportunities.

2. **Customer & Opportunity Assessment:** Connecting with potential customers, while understanding possible opportunities. This assessment includes understanding customer needs, preferences, and pain points.

3. **Capture Planning:** Collaborating within your company as you use repeatable capture planning activities. This includes defining clear win themes that resonate with the customer, identifying key decision-makers and influencers, and understanding the customer's decision-making process.

These initial phases lead into the proposal development stage. Once you progress to Phase 4, you can solidify your customer-facing messages. This brings more customer focus to your activities. Then, continue to improve the quality of what you submit to your customers. You can subsequently focus on the final three phases.

4. **Proposal Planning:** Preparing a proposal management plan. In Phase 4, you create a proposal plan that outlines the proposal's scope, schedule, roles, and responsibilities.

5. **Bid & Proposal Development:** Developing content, visuals, and messaging focused on the customer's buying vision. In Phase 5, you draft a customer-focused proposal.

6. **Post-Proposal Activity:** Securing the contract award! Phase 6 also includes delivery and ongoing customer relationships.

For further information on Shipley's Business Winning Lifecycle, make your way here.

Identifying common (and avoidable) pain points

Amy and Kelson recently returned from a global Shipley conference. There, they met with colleagues from around the world and discussed evolving best practices and innovations in business development work.

Common pain points that you can avoid through optimization

- Customer positioning - Too little or too late

- Not enough planning

- Inefficient processes

- Non-compliance

- Lack of customer focus

- Poor writing

- No/poor use of automation

They also picked up on several common issues—not only across industries, but across countries.
Rest assured, if any of these pain points seem familiar, you're not alone.

> "Unfortunately, we still see teams struggling with compliance issues and a lack of customer focus. And frankly, just poor writing and little or no use of automation. Things can be addressed, and if you do, they'll really set you up for success!"
>
> **Amy McGeady**

#Optimize your Proposal Development with Shipley's POWeR Process

P Planning

O Organizing

W Writing

E Examining

R Revising/Rehearsing

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The good people at Shipley help companies optimize proposal development with their **POWeR Planning** methodology. These five steps are the cornerstone of Shipley's recommended writing process, proven to improve the quality of your proposals.

What is POWeR? A process to facilitate planning, organizing, writing, examining, and revising your Proposals. POWeR also helps you rehearse oral presentations.

When writing your proposals, it's critical to devote time up front for planning and organizing. Amy knows firsthand...

> **"We need to spend about a quarter of our scheduled time—whether it's three weeks or three days up front—doing some important planning and organizing so our writing can go smoothly. Then, we spend about a quarter of the time, at the end, getting feedback and editing."**
>
> **Amy McGeady**
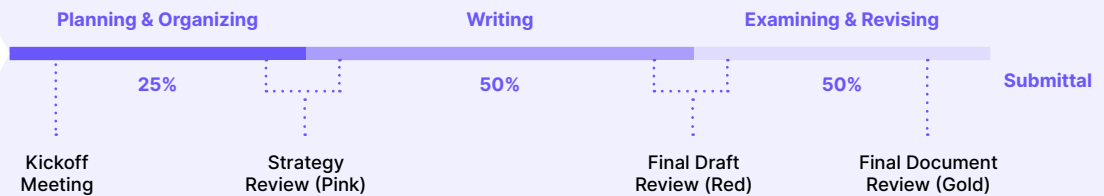
Staying on track with POWeRful proposal development

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Inputs

Competitive
Assessment

Win Strategy

Bid Request or
RFP Receipt

Planning & Organizing   **Writing**   **Examining & Revising**

25%   50%   50%   **Submittal**

Kickoff
Meeting

Strategy
Review (Pink)

Final Draft
Review (Red)

Final Document
Review (Gold)

In other words, staying on track during proposal development is paramount to a successful win. Amy has a formula to help you do just that. This will aid buy-in with your subject matter experts and leadership teams.

At the bottom of the graphic you'll notice **4 key milestones**. These are best practices for effective writing.

🔊   Amy outlines this from 6:11 minutes if you want to tune in!

1. **Hold a strong kickoff meeting:** Don't just align the team, set them up for success. Provide information about the opportunity, produce writers' packages, and deliver the proposal schedule. A kickoff meeting is only as strong as your preparation and organization.

2. **Hold a strategy review:** This is performed by the Pink Team and is best done before you dive too deeply into proposal writing. Strategy reviews include analyzing your win strategy to ensure you have the right solution. This review also involves developing the proposal theme statements that show your customer how your solution benefits them. Only then can you start writing efficiently.

3. **Final draft review:** Perform this review as though you are the evaluator receiving the proposal. Then do some edits after that. This is conducted by the Red team and subsequently leads you to your final review

4. **Final document review:** This final review ensures the document is ready to submit to the customer.

If you follow these four key milestones, you will produce higher-quality proposals that require fewer rewrites. Ultimately, these milestones will increase the likelihood of writing a compliant and responsive proposal that wins business.

POWeR: Planning and Organizing for winning responses

So, let's kick off with the P and O components of Shipley's POWeR process. Automation brings strengths in terms of the mundane and repeatable components of developing proposals. That said, automation should not help us cut corners on quality. Planning is everything.

Two ways in which you can implement Planning and Organizing within your proposal writing include:

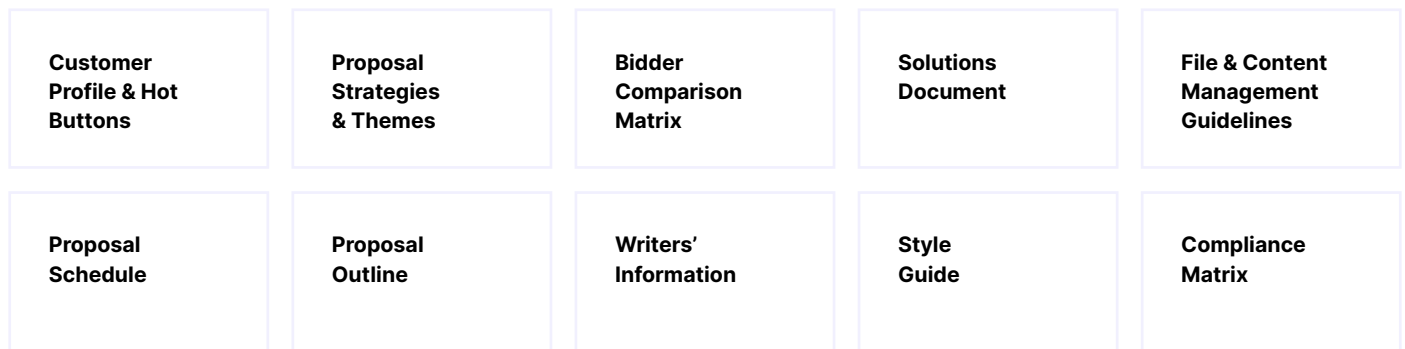## 1. Create a Proposal Playbook for optimum planning

These are designed to help you plan your proposal development. If we're the one who's responsible for preparing a proposal response, we need to understand who we're bidding to and what their issues are. We need to stay focused on the value to the customer.

🔊 See Kelson guide us through 10 checklist items at the 7:44 minute mark of the webinar

> "These are things we can look at to help us plan properly… We're directing that traffic, so some of the things that are important for us to do are included here."
>
> **Kelson Forsgren, VP of Program Development, Shipley Associates.**

One way to plan is to create a Proposal Playblook

Customer Profile & Hot Buttons	**Proposal Strategies & Themes**	**Bidder Comparison Matrix**	**Solutions Document**	**File & Content Management Guidelines**
Proposal Schedule	**Proposal Outline**	**Writers' Information**	**Style Guide**	**Compliance Matrix**

Among the 10 checklist items, we have:

- **Customer Profile & Hot Buttons:** Ideally, members of your sales account or capture team are talking to the client. They can provide insight into what customers care most about.

- **Proposal Outlines:** Tools you can use to stay on track. They ensure you're responding to items the customer specifically wants and needs.

- **Bidder Comparison Matrix:** An intrinsic tool used for developing your proposal strategy. Particularly value proposition, team forecasting, and more.

- **Style Guides:** The standards inherent to your company including writing, formatting, and document design.

- **Compliance Matrix:** Another important tool to cross-reference your proposal with the request for proposal (RFP). This matrix is a table that spells out each requirement stated in the RFP and lists exactly where in your proposal (section, page number, etc.) that requirement is addressed.

> **"In collaboration with automation, you can work toward solving more strategic issues. This allows you to focus on winning new business."**
>
> **Kelson Forsgren, VP of Program Development, Shipley Associates.**

2. Organize your proposal so it's easy to evaluate

Another methodology to plan for Winning Responses? Organizing your proposal in a way that's easy to evaluate.

Organize your proposal to make it easy to evaluate

01 Organize as Instructed	02 Mirror the Bid Request	03 Organize Around Customer's Hot Buttons
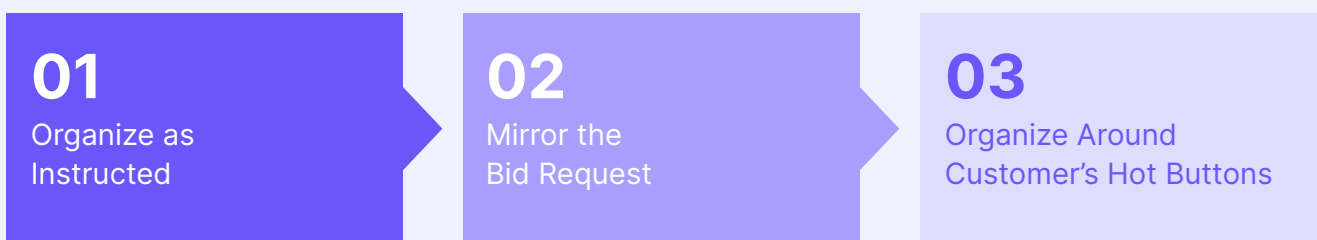
The customer often provides instructions, outlining how they want your response structured. After all, they're the ones looking at the information and scoring accordingly. So, organize your response as instructed.

If, however, you're not told how to organize your response, then it's imperative to follow/mirror the structure of the bid request. Reflect similar headings so the request and response match.

What if you don't have a bid request or instructions? You may be soliciting customer business without receiving an RFP. In that situation, organize around the customer's hot buttons.

🔊 To hear Kelson discuss the above, make your way to 9:59 minutes

POWeR: Customer-focused writing for winning responses

Even with Automation, it's imperative to have "human eyes" throughout the process. Your response needs to be structured cohesively and clearly.

1. Customer-focused writing

> 🔊 Kelson provides key tips for customer-focused writing and keeping your proposal organization clear and clean, from 11:02 minutes***

01 Determine the heading, sub-heading, structure for your outline

02 Follow the order of topics/requirements used in the solicitation (or prioritize the hot buttons if no formal solicitation)

03 Use numbering system that aligns with solicitation

04 Use the topics/requirements heading to assign each requirement to an outline section; check for additional topics/requirements

05 Refer to RFP section(s) in the outline to help contributors

06 Allocate page targets in the outline to help contributors

07 Add any additional instructions to outline (as needed)

> "Anything we can provide in this planning and organizing process to help the team respond will be beneficial. And it streamlines the process. Our final document review will be more on target, more in line with the response, and will have fewer changes going forward."
>
> **Kelson Forsgren, VP of Program Development, Shipley Associates.**

🔊 There's another key item to consider when creating a winning proposal that Amy outlines at 12:56 minutes in the webinar. It includes...

2. Writing for the evaluators

Unlike other forms of writing, proposals require you to write for your evaluators. You're trying to win points on a scorecard, while competing with others to win business. Therefore, as you write, it's very important to focus on being clear, concise, correct, and compelling.

> **"In our early education about writing, we learn to put together details and build to a conclusion. That's not what we want to do in proposal writing. Instead, we want to make our main point then share details. Some of you might have heard the acronym BLUF—'bottom line up front.' I find that to be helpful, not only in writing proposals, but even just writing emails internally."**
>
> **Amy McGeady, Senior VP of Strategic Services at Shipley Associates**

🔊 From 13:51 minutes, Amy provides bullet points for more customer-focused writing, as outlined below.

10 tips for customer-focused writing

01 Name the customer before us

02 Name the customer more often than us

03 Mention and address the customer's buying objective

04 Link the buying objective to our offer

05 Address customer "hot button" issues in prioritized order

06 List benefits before features

07 Validate all claims

08 Organize as instructed

09 Make our value proposition apparent to the customer

10 Be consistent, clear, and concise.

Within those 10 points, Amy highlights a few due to their critical nature:

Point 3: **Mention and address the customer's buying objective.**
In other words, make it clear that you understand what the customer wants to accomplish. What might their pain point be? Make sure you state that to them.

Point 5: **Address customer "hot button" issues in prioritized order.**
When you're addressing customer hot buttons, prioritize them. Ensure you're talking about their most important hot buttons first. That's where you need to spend the most time and attention.

Point 6: **List benefits before the features.**
We can overly focus on all the great elements of either our software solutions or our service. We can obsess over the equipment we're selling and the features of it. That said, in the proposal phase, we need to outline the direct benefit to the customer. The feature itself can wait.

Point 9: **Ensure the value proposition is apparent to the customer.**
The customer shouldn't have to do any guesswork when determining your unique discriminators. They should know what's unique, important, and special about the solutions you offer.

POWeR: Examining and revising for winning responses

After you've invested so much into writing, it's time to take a step back. This is pivotal when examining your work. Revision will improve your evaluation scores..

Under the 4 key milestones, Amy mentioned dedicating at least a quarter of the schedule to examine and revise. Use those proposal reviews to check for compliance and consistency. Ensure your focus is on the customer and their needs. Then, use the feedback you receive internally to revise for a winning proposal.

> **"Our evaluators are very busy people. The TL;DR 'Too long, didn't read' world isn't just on Instagram and TikTok. It also exists in evaluating proposals."**
>
> **Amy McGeady, Senior VP of Strategic Services at Shipley Associates**

Does what you have address the 4Cs?
Where can you improve?

The questions you need to ask your evaluators are:

1. **Is what we've provided compelling?**

2. **Is it clear?**

3. **Are we correct?**

4. **Is it concise?**

5. **Where can we improve?**

When you ask for this type of feedback, you're more likely to get valuable information that improves your proposals.

Compelling

Concise

Clear

Correct
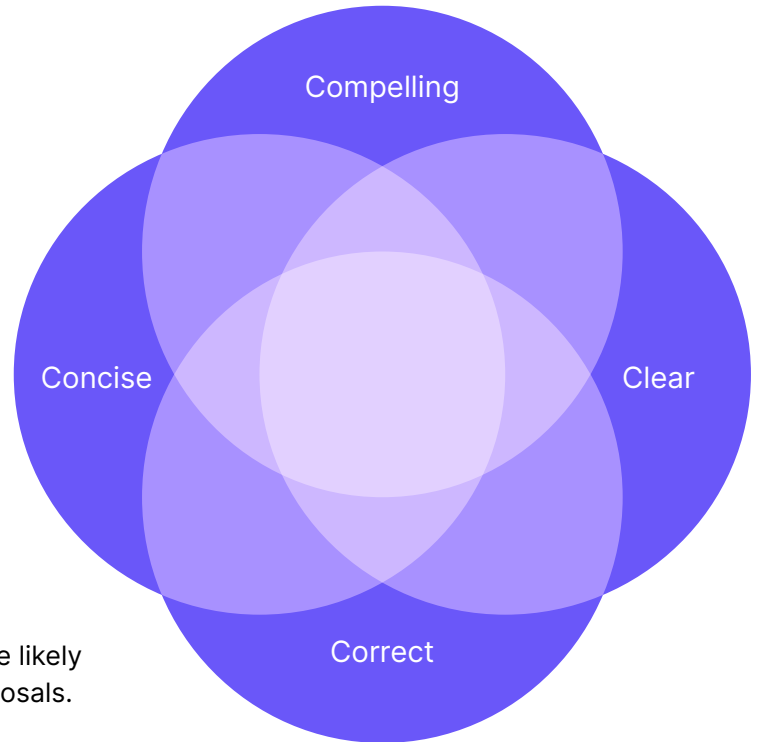
"**When we don't give direction, sometimes our internal evaluators don't know what we want. They can get hung up giving us grammatical feedback. These are things a quick copy edit could fix... What we really want to know is, have we persuaded a potential buyer that we're the company to choose?**"

Amy McGeady, Senior VP of Strategic Services at Shipley Associates

Key takeaways

If you spend time planning and organizing before writing, using clear language, you will optimize your proposal development. You'll win more business, and you'll have fewer headaches while doing it. Your team will work together better. And we hope that you'll have more winning with lower stress!

This presentation tackled the following topics:

1. Overview of Shipley's Business Winning Lifecycle

2. Identifying common (and avoidable) pain points

3. Optimizing your proposal development with Shipley's POWeR Process

4. POWeR: Planning and Organizing for winning responses

5. POWeR: Customer-focused writing for winning responses

6. POWeR: Examining and revising for winning responses

> 🔊 To see what viewers of our webinar asked both Amy and Kelson during the Q&A, make your way to 17:36 minutes.

Some hot topics include:

1. **Tools for identifying Hot Buttons (17:48 minutes):** You can gather intel from your sales team. You can undertake some basic research on the agency (in fact, hot buttons might be highlighted in the RFP itself).

2. **What makes compelling content compelling! (20:35)** Address the customer's issues from their perspective. This takes practice to convey, but it makes for instantly compelling content from their perspective.

3. **Further insights on mirroring the bid request (23:30)** Typically, customers will indicate how they want the bid response returned. What if they don't provide that structure? Simply mirror the outline of the queries or topics they initially sent to you.

4. **What percentage of Q&A pairs in a proposal database should have interpretive benefit statements? (26:28)** You won't want a lot of marketing materials in there—that can be in a separate section. However, as far as the technical responses go, you should have some form of enticement. Value to the customer may be long-term, for instance.

5. **Balancing your granularity (28:10)** First, establish the various intended audiences. For example, the executive-level reader might skim more than the detail-orientated, tech-focused reader.

VT Writer can help with many of the challenges and best practices mentioned in the webinar. With objective metrics and the ability to score every paragraph for clarity, readability, and grade level.

Overcoming these barriers and equipping your teams with the right tools to solve these challenges allows you stay ahead of the game and win more. Leading global companies are using VT Writer in their proposal writing processes. You should consider it too.

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Want even more content about proposal writing?

We've compiled the ultimate guide to proposal writing, drawing on the expertise of experienced proposal writers.

Download the guide now

Need help or have a question?

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