

Shingley Associates
Federal Business Development Training

Writing Winning Proposals

Presented by
Shingley Associates

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Welcome to Writing Winning Proposals

- Please Sit by Someone You Don't Know
- Relax and Be Comfortable
- Fill Out Name Tents with a Felt-Tip Marker
- Fill in Roster for Use in Making Workshop Completion Certificates

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Introductions

- Name
- Current Job Function
- Business Development Experience
- Workshop Objective

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Logistics

- 8:00AM – 5:00PM
- Interactive Sessions
- Team Exercises
- Frequent breaks
- Cell Phones
- Lunch
- Other

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Executive Summary

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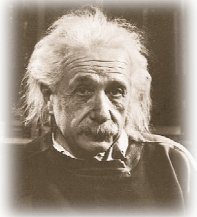
How Many of These Lights are People Working on Proposals???

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Definition of Insanity

Doing what you have always done, but expecting different results!



A. Einstein

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Please Answer the Questions

- What is a Proposal?
- What is a Good Proposal?
- What Does it Take to Make a Good Proposal?

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Workshop Content

1. Executive Summary
2. Writing for Evaluators
3. Special Interest Items
4. The Six-Phase Business Development Process
5. Proposal Operations Overview
6. Planning to Write
7. Writing Proposal Sections

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Major Skill-Building Exercises



- Evaluating Proposals
- Planning to Write Using the Proposal Development Worksheet (Multiple Exercises)
- Mocking Up and Storyboarding Your Proposal Section

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Federal Business Development Training

Writing for Evaluators

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Annual Federal Spending Under the FAR

\$300 Billion!



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Four Levels of Regulations

1. Federal Acquisition Regulations
2. Federal Agency Supplements
3. Agency Subordinate Organizations Regulations
4. Sub-subordinate Headquarters Regulations

U.S. Federal Government
 Agency
 Agency Subordinate Organization
 Regulations of Subordinate Headquarters

Examples: DOD, DOE, FAA
 Example: Air Force AFR 70-30
 Example: Navsea Source Selection Guide

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RFP Preparation Process

Problem, Need, Budget
 TECHNICAL PERSONNEL
 Requirements
 SOW (Section C), Specification (Section C)
 CDRL (Section J)
 Purchase Request
 Procurement
 PCO
 Sections L&M
 Prepare and Issue RFP

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Source Selection Organization

THE SSA DECIDES
 Source Selection Authority (SSA)
 Contracting Officer (CO) and Contract Definition/Team
 Advisors

THE SSAC COMPARES
 Murder Board
 Source Selection Advisory Council (SSAC)

THE SSEB EVALUATES
 Chairperson, Source Selection Evaluation Board (SSEB)
 Consultants
 Mgmt. Area Chief, Technical Area Chief, Past Perf. Area Chief, Other Area Chiefs, Cost Panel Chief
 Team Chief, Team Chief, Team Chief, Team Chief
 Factor Evaluators

Systems Engineering Technical Assistance (SETA) contractors may be used by the SSEB as consultants.

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Scoring Systems

Numbers	Adjectives	Colors
10		
9	Outstanding	[Dark Blue]
8		
7	Satisfactory	[Green]
6		
5		
4	Marginal	[Yellow]
3		
2		
1	Unsatisfactory	[Red]

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Scoring Systems: Example

Criteria	Technical					Management				Criteria
	Item 1	Item 2	Item 3	Item 4	Item 5	Item 1	Item 2	Item 3	Item 4	
Criteria 1	[Blue]	[Green]	[Green]	[Green]	[Blue]	[Red]	[Green]	[Blue]	[Blue]	Criteria 1
Criteria 2	[Red]	[Red]	[Red]	[Yellow]	[Blue]	[Red]	[Red]	[Yellow]	[Blue]	Criteria 2
Criteria 3	[Yellow]	[Blue]	[Blue]	[Blue]	[Blue]	[Green]	[Green]	[Green]	[Blue]	Criteria 3
Criteria 4	[Yellow]	[Yellow]	[Red]	[Red]	[Red]	[Green]	[Green]	[Green]	[Blue]	Criteria 4

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SIMULATION

Simulation Materials

- U.S. Army Ultralight RFP - Appendix B
- Scoring Instructions - Appendix C
 - ✓ Instructions pg. C3 - C4
 - ✓ Maxair Score Sheet pg. C5
 - ✓ Etherwinds Score Sheet pg. C6
 - ✓ SSEB Chairperson Instructions pg. C9
 - ✓ SSEB Summary Sheet pg. C11
 - ✓ Evaluation Standards pg. C13 - C14
- Maxair Proposal (Handout)
- Etherwinds Proposal (Handout)

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Individual SSEB Assignments

Team Size	3	4	5	6	7
Configuration	1	1	1	1	1
Performance	2	2	2	2	2
Transportability	2	2	3	3	3
Maintainability	3	3	3	4	4
Ease of Assembly	3	3	4	5	5
Trade-Offs Analysis	3	4	5	5	6
Program Plan & Schedule	3	4	5	6	7

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SSEB Simulation Procedure

DO INDIVIDUALLY—NO DISCUSSION

- Read and Understand RFP (Time ____ to ____)
- Evaluate "First" Proposal (Time ____ to ____)
 - ✓ Teams ____: Maxair
 - ✓ Teams ____: Etherwinds
- Evaluate "Other" Proposal (Time ____ to ____)

DO AS A TEAM—FULL DISCUSSION

- Post Average Weighted Scores (Time ____ to ____)
- On the SSEB Summary Sheet (Time ____ to ____)
- Discuss Criteria 8 & 9, Determine Team Evaluation, Enter on Summary Sheet, and Total Scores (Time ____ to ____)
- Provide Final Scores and Number of Deficiencies to Me by: Time ____

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SSEB Simulation Results

	Maxair Score	Maxair Deficiencies	Etherwinds Score	Etherwinds Deficiencies
Alpha				
Bravo				
Charlie				
Delta				
Echo				
Foxtrot				

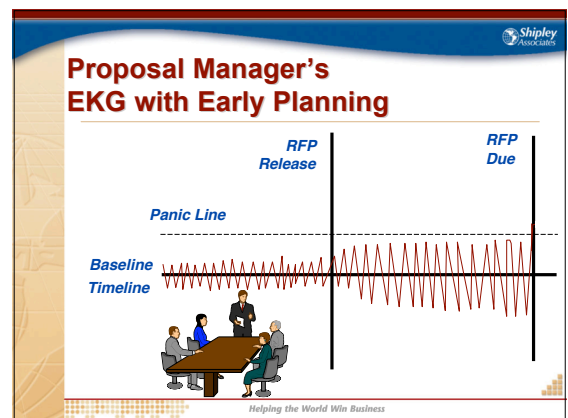
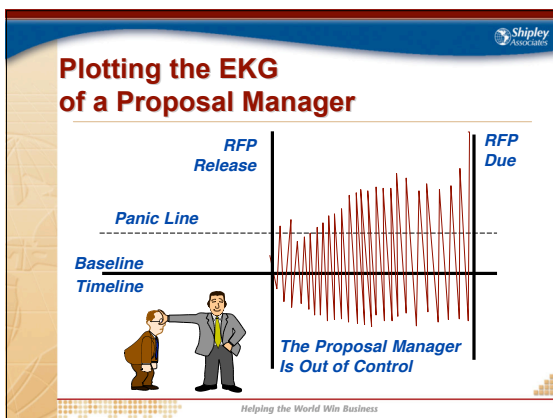
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To Increase Win Rates:

It is better to have a good solution in a superior proposal, than a superior solution in a mediocre proposal



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Proposal Development Worksheet

Pg. 3

Defining Your Offer (cont.)

Features	Benefits
Flexible scheduling	Employs workers for shorter periods
Lower material management costs	Low administrative overhead
Extended Range - 25 miles	Greater responsiveness capability
High speed road fit	More responsive to customer needs
Global Service	Greater availability in more territories
...	...

Developing Your Strategy

Us	Them
... 100% staff change	... 50% staff change
... 100% road fit	... Higher overhead (\$1,000,000)
... Global Service	... Higher speed road fit
... Higher RPE	... Global Roadfit

Defining Your Offer (cont.)

How management time of any leading role is minimized, we need not to mention it, as the user's extra weight through compensating factors that give more leading factors and should provide acceptable rate.

Part Performance ... We as business leaders do not in the field and industry, using our own discretionary authority, which may also provide evidence of our... **APPENDIX**

Part Performance ... Our performance in Colorado, indicated the 100% A use in... **APPENDIX**

Part Performance ... Our focus remain should provide convincing evidence of our... **APPENDIX**

Proposal Development Worksheet

Pg. 4

Defining Your Offer (cont.)

How management time of any leading role is minimized, we need not to mention it, as the user's extra weight through compensating factors that give more leading factors and should provide acceptable rate.

Part Performance ... We as business leaders do not in the field and industry, using our own discretionary authority, which may also provide evidence of our... **APPENDIX**

Part Performance ... Our performance in Colorado, indicated the 100% A use in... **APPENDIX**

Part Performance ... Our focus remain should provide convincing evidence of our... **APPENDIX**

Figure No. Figure 2, 2-5

Figure Title: Superior Grade Factor

Notes/Comments: A grade on the 6:1, 8:1, 10:1, 12:1 to have a higher mission versatility

Proposal Room Organization

- Wall Organization
- Areas Identified for Each Storyboard
 - ✓ PDWs
 - ✓ Mockups
 - ✓ Drafts
 - ✓ Control of Sensitive Documents
- Other Material on Wall
 - ✓ Draft Executive Summary
 - ✓ Proposal Outline
 - ✓ Proposal Schedule
 - ✓ Evaluation Criteria
- Support Equipment: Computers, Printers, etc.

Daily Operations Meetings

- Update Status
- Track Problems
- Communicate Laterally Across Team
- Maintain Schedules
- Integrate All Components
 - ✓ Technical
 - ✓ Management
 - ✓ Cost

Planning to Write

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Planning before you write facilitates sound proposal writing that infuses strategy, provides greater customer focus, sells benefits to customer and more effective use of appropriate and targeted visuals

Proposal Development Worksheet (PDW)

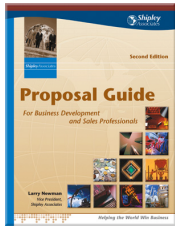
- Understanding the Task – Administrative Information
- Compliance Checklists
- Section Outline
- Customers Major Issues
- Technical/Management Approach
- Features and Benefits
- Risk Management
- Relevant Experience
- Past Performance
- Relevant Proposal/Section Strategy
- Themes
- Key Visuals

Compliance Checklists

- Detail Every Section Requirement Needing a Response
- Provide an Action Plan for Writing
- Facilitate 100% Responsiveness
- Use in Reviews
- Provide a Basis for Detailed Section Outlining

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Shipley Associates Proposal Guide



Please select any topic in the *Proposal Guide* and be prepared to give a 30 - 45 second debrief of the key elements of your topic first thing tomorrow morning

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Good Morning



“The three criteria for winning a competitive procurement:

- **Responsive**
- **Responsive**
- **Responsive**

in that order.”

Norman R. Augustine
former CEO Lockheed Martin

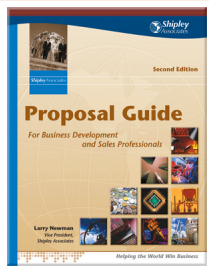
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Agendas

<u>Yesterday</u>	<u>Today</u>
<ul style="list-style-type: none"> • FAR and Source Selection • Proposal Process • Proposal Operations • PDW – Compliance Checklist 	<ul style="list-style-type: none"> • Proposal Guide • PDW: <ul style="list-style-type: none"> ➢ Outlining ➢ Issues ➢ Solution Approach ➢ Features-Benefits ➢ Risk ➢ Past Performance ➢ Strategy ➢ Themes ➢ Visuals

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Shipley Associates Proposal Guide



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Outlining Guidelines

- Do Not Deviate from the RFP
- Start with Proposal Preparation Instructions in Section L
- Integrate SOW, CDRL, TRDs, and other Requirements into the “L” Structure

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Issues

- Are the Customer's Worry Items
- Are Key Program Requirements
- Are Areas of High Risk
- Are Areas Where You Can't Meet Requirements
- May or May Not Be in the RFP

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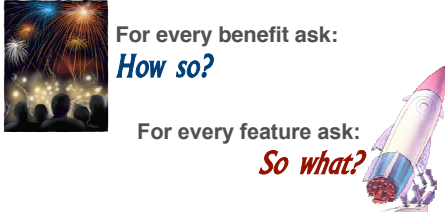
Technical and Management Approach

Your Approach Must Be:

- Credible
- Perceived as Having Low or Acceptable Risk
- Understandable
- Competitively Priced

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Link Features to Benefits



For every benefit ask:
How so?

For every feature ask:
So what?

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Risk Management

- Identify the Risks
- Assess - Low, Moderate, High
- Prioritize - Technical, Schedule, Cost
- Determine Causes
- Develop Mitigation Approach
- Determine Other Proposal Areas Affected
- Implement Strategic Management Method

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Relevant Experience/ Past Performance

- Relevant Experience Describes the Same or Similar Work Your Company (or Individuals) Has Done
- Past Performance Indicates How Well You Have Done That Work

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OFFPP Past Performance Evaluation Criteria

Quality of Performance	Cost Control	Timeliness of Performance	Business Relations
Compliance with contract requirements -Accuracy of reports -Appropriateness of personnel -Technical excellence	-Within budget (over/under target cost) -Current, accurate, and complete billing -Relationship of negotiated costs to actuals -Cost effectiveness -Change order issue	-Met major milestones -Reliable -Responsive to technical directive -Completed on time, including wrap-up and contract administration -No liquidated damages assessed -Effective contractor recommended solutions	-Effective management -Responsive to contract requirements -Prompt modification of problems -Reasonable/cooperative -Flexible -Pro-active -Effective small/medium sized business relationships
Unsatisfactory - Significant deficiencies are compromising the achievement of contract requirements, despite use of Agency resources.	Unsatisfactory - Cost issues are compromising performance of contract requirements.	Unsatisfactory - Delays are compromising the achievement of contract requirements, despite use of Agency resources.	Unsatisfactory - Response to requests, or technical, service, or administrative issues is not effective and responsive.
Fair - Nonconformances require minor Agency resources to ensure achievement of contract requirements.	Fair - Cost issues require minor Agency resources to ensure achievement of contract requirements.	Fair - Delays require minor Agency resources to ensure achievement of contract requirements.	Fair - Response to requests, or technical, service, or administrative issues is somewhat effective and responsive.
Good - Nonconformances do not impact achievement of contract requirements.	Good - Cost issues do not impact achievement of contract requirements.	Good - Delays do not impact achievement of contract requirements.	Good - Response to requests, or technical, service, or administrative issues is an fully effective and responsive.
Excellent - There are no quality problems.	Excellent - There are no cost issues.	Excellent - There are no delays.	Excellent - Response to requests, or technical, service, or administrative issues is highly effective and responsive.

** PLE'S - The contractor has demonstrated an exceptional performance level to any of the above four categories that justifies adding a point to the score. It is expected that this rating will be used in those rare circumstances when contractor performance clearly exceeds the performance levels described in "Excellent".

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Proposal Strategy Development

Proposal Strategy
 1. Write the proposal.
 2. A miracle happens.
 3. We win!

“Pretty sound strategy; except for step two.”

RFP

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Strategy Development

- Based on Marketing Intelligence
- Focused on Customer Issues That Are Discriminators
- Developed from an Evaluation of the Customer’s Perspective of Each Competitor for Each Discriminator
- Tell the “What” and “How”

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Discriminators

- Separate You from Your Competition
 - ✓ Provide Uniqueness If Possible
 - ✓ Show Differences from at Least One Major Competitor
- Are Positive and Negative
- Are Important or at Least Significant to Your Customer

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Strategy Development

- Based on Marketing Intelligence
- Focused on Customer Issues That Are Discriminators
- Developed from an Evaluation of the Customer’s Perspective of Each Competitor for Each Discriminator
- Tell the “What” and “How”

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Strategy Development Procedure

1. Marketing Intelligence
2. Customer Issues/Discriminators
3. Bidder Comparison Chart
4. Strategy Statements

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Good Strategy

- Discriminates You from Your Competitors
- Matches Your Offering to the Customer’s Needs
- Emphasizes Your Strengths
- Mitigates Your Weaknesses
- Highlights Competitor’s Weaknesses
- Neutralizes Competitor’s Strengths

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“Hope is not a strategy.”

Norman R. Augustine
former CEO Lockheed Martin

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Guidelines For Themes

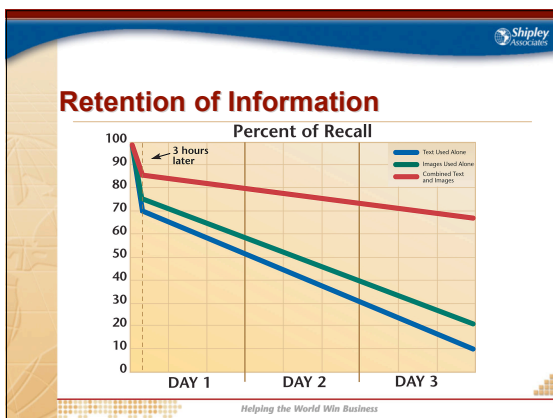
- Be Specific
- Quantify, If Possible
- Provide Features and Benefits
- Support Strategy
- Provide the Evaluator Your “Silver Bullet”

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Memory Retention Exercise

Sky	_____
Fire	_____
Ruler	_____
Car	_____
Weekend	_____
Blue	_____
Salad	_____
Pantyhose	_____
Ruler	_____
Park	_____
Book	_____
Ruler	_____
Button	_____
Dog	_____

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Graphics Advantages

- Conserve Proposal Space
- Provide Instant Grasp of Message
- Aid Evaluators Memory Retention of the Message
- Break Up Text and Enhance Readability of the Proposal
- Provide a More Professional Presentation Enhancing Your Company Image

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Guidelines for Visuals

- Keep Simple and Uncluttered
- Maintain Vertical Orientation
- Stand Alone Independent of the Text
- Provide Action Captions
- Understandable < 10 Seconds
- Follow Traditional Logic
 - ✓ Left to Right
 - ✓ Top to Bottom
 - ✓ Clockwise

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Guidelines for Action Captions

- Draw the Conclusion for the Reader
- Are Full Sentences
- Contain Three Parts: Figure Number, Title, Supporting Text
- Provide Features and Benefits
- Are Succinct
- Allow the Graphic to Stand Alone

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Write an Action Caption

Day	Ave. Nap Hours Per Day
M	6.5
T	5.5
W	6.2
T	4.8
F	2.2

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Write an Action Caption

Day	Ave. Nap Hours Per Day
M	6.5
T	5.5
W	6.2
T	4.8
F	2.2

Figure 1-1. Nap Hours Per Day. While other companies experience the TGIF syndrome, our team is almost three times more alert on Friday than Monday.

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Good Morning!

“They couldn’t hit an elephant from this dist _____.”

—Last words of General John Sedgewick, Battle of Spotsylvania, 1864

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Agenda

<p>Yesterday</p> <ul style="list-style-type: none"> • Compliance Checklists • Outlining • Issues, • Solution Approach • Features-Benefits • Risk • Past Performance • Strategy • Themes • Visuals • Mock-ups 	<p>Today</p> <ul style="list-style-type: none"> • Mock-ups • Storyboard Mock-ups • Storyboard Review of Mock-ups • Writing Proposal Sections
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**Conceptual Difference:
Scientific Versus Proposal Writing**

Scientific Writing
Scientific writing starts with the details and subordinates main points.

Proposal Writing
Proposal writing starts with the main point and subordinates details.

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Section Organization - 4-Box

- Section Title
- Box 1
 - ✓ Theme
 - ✓ Vision including customers requirement (for this topic), why it is important, macro solution, and benefits to customer
- Box 2
 - ✓ Preview the main numbered (Outline) responses to the compliance checklist or hot buttons – list them if over two
- Box 3
 - ✓ Respond to each requirement in the same sequence as the RFP; infuse strategy, and provide appropriate and effective visuals. If appropriate, discuss risk and past performance as unnumbered (title only) paragraphs
- Box 4
 - ✓ Summary to include restatement of benefits to customer

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Effective Section Introductions

- Preview content in order
- Match section subheadings
- Follow the section summary

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Use Two Types of Headings

1. **Telegraphic** - Labels content
2. **Informative** - Informs readers

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Telegraphic Headings Label

- Executive Summary
- Management Summary
- Technical Proposal
- Cost Volume
- Appendix

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Informative Headings Inform

- Similar to newspaper headlines
- Link benefits to features
- Begin with verbs to convey action
- Begin with nouns to signal purpose

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Mock-Ups

- Prototype the Section
- Facilitate Planning
- Allow for Peer & Management Review
- Coordinate Sections
- Avoid Unnecessary Writing
- Avoid Wrong Emphasis
- Provide Proposal Development Efficiency

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Mock-up Development Step 1

- Obtain the number of blank pages allotted to your section from the top of page 1 of the PDW
- Style those pages to fit your proposal; i.e., double column with 1-inch margins

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Mock-up Development Step 2

- Overlay your section outline onto the allocated pages
- Size the topic area by boxing, using your best judgment on what space will be required for that topic
- Don't forget the introduction and summary

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Mock-up Development Step 3

- Locate and size graphics (box) in the appropriate locations
- Sketch or describe each graphic within the box
- Place figure number, title, and action caption for each graphic
- Identify theme locations and place themes in boxes

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Mock-up Development Step 4

- Add key words for content
- Don't forget the introduction and the summary

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EXERCISE

Develop and Storyboard a Three-Page Mock-Up

Mock up your assigned section of the ULA performance, and storyboard it on the wall. Your Mockup Should Contain:

- Your outline (page 1 of your PDW)
- Allocation of space for outline topic
- A theme for your section (page 3 of the PDW)
- Implementation of your section strategy (page 3 of the PDW)
- Key features and benefits of your section (page 3 of the PDW)
- Sketches or descriptions of each graphic for the section (page 4 of the PDW)
- An action caption for every graphic (page 4 of the PDW)
- Key words for the content to be discussed for each outline topic (address customer issues and solution, page 2 of the PDW)
- Written-out introduction and summary

Please have your storyboards on the wall at (time)

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Writing Guidelines

- Preview complex sections
- Short coherent, logical paragraphs
- Use lists
- Sentences < 20 words
- Active voice
- Frequent headings mirroring RFP language
- Emphasize functions, not operational details
- Substantiate claims
- Ghost the competition
- Address risk

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Writing Tips

- Use simple, familiar, concrete words
 - ✓ Not: Optimization procedures were implemented during scheduled startup.
 - ✓ But: _____
- Avoid too many “buzz” words
- Avoid overly long, complex sentences
 - ✓ Limit sentence length to about 20 words
 - ✓ Limit paragraphs to about 150-175 words
- Use your word processor grammar checker
 - ✓ Lower your “fog” index
 - ✓ Lower the assumed grade level of your audience

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Writing Tips

Write exactly what you mean:

<p>NOT</p> <p>enclosed herewith please find for the purpose of has the ability to in the event that provide a means whereby take corrective action utilize, utilization with the result that in order to</p>	<p>BUT</p> <p>here is to can if enable correct use so to</p>
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Writing Tips

- Write in the first person plural
 - ✓ Use we, us, and our
 - ✓ First person pronouns are more direct, natural, and forceful
 - ✓ You’ll save words by writing in the first person
- Make it lean
 - ✓ Gettysburg Address
 - President Lincoln spoke for two minutes (267 words)
 - Edward Everett (the “greatest orator of the age”) spoke for two hours
 - ✓ Inaugural addresses
 - President John Kennedy spoke for 14 minutes

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Writing Tips

Remove redundancies

- absolute essentials
- adequate enough
- advance planning
- and so as a result or so
- complete satisfaction
- depreciate in value
- new recruits
- joint cooperation
- past history
- until such time as

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Writing Tips

Turn noun constructions into verbs:

<p>Noun Construction</p> <p>have the ability to be in agreement with be of assistance to effect a change in conduct an investigation of make a modification to make use of make mention of</p>	<p>Simple Verb</p> <p>can agree help change investigate modify use mention</p>
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Writing Tips

- Avoid sexist language
 - ✓ flight attendant not stewardess
 - ✓ Workforce not manpower
 - ✓ Employee not workman
 - ✓ labor hours/person hours not man-hours
- Use "their" rather than "his" or "her"
- Be more concerned with avoiding sexist language than with subject-verb agreement

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Writing Tips

Use active voice:

- Sentences have three basic elements:
 - ✓ the actor--the person or thing performing the action
 - ✓ the action--the verb
 - ✓ the receiver--the person or thing receiving the action
- Active voice
 - ✓ the actor is in front of the action
 - ✓ "Australian companies manufacture millions of precision machine tools."
- Passive voice
 - ✓ the receiver is in front of the action
 - ✓ "Millions of precision machine tools are manufactured by Australian companies."

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Writing Tips

Exceptions when passive voice may be appropriate

- The actor is either unknown or irrelevant
 - ✓ This liquid was emptied into pool A.
- You want to avoid casting specific blame on someone else
 - ✓ An error was made on page 3.
 - ✓ Or, inside the Beltway, use the ever popular "mistakes were made."
- Using passive voice shifts the emphasis of the sentence; sometimes the action is more important than the actor.

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Writing Tips

Passive

- A functional outline of the program is included in the WBS.

Active

- _____

Passive

- Monthly status reports will be provided.

Active

- _____

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Review

- Define Proposal
- Evaluation Process
- Business Development Process
- Proposal Operations
- Planning to Write (Storyboarding)
- Mock-ups
- Team Review
- Writing Techniques

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Avoiding The Nine Phases of Classic Proposal Development

1. Unbridled Enthusiasm
2. Guarded Optimism
3. Cool Objectivity
4. Mutual Confusion
5. Partial Disengagement
6. Utter Disenchantment
7. Search for the Guilty
8. Punishment of the Innocent
9. Awards to the Non-participants

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