



# Strategies for Winning Proposals

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7910 Woodmont Avenue | Suite 540  
Bethesda, MD 20814  
301.657.4440 Phone | 301.657.4499 Fax

# Keys to Proposal Success

- Compliance
- Understanding
- Approach
- Risk

# Pre-RFP Activities

- Market Research
  - Is there an incumbent?
  - Who is the government program manager?
  - What is the current contract value?
  - Respond to Sources Sought Notice
- Develop Relationships
  - Meet with agency small business personnel
  - Meet with agency technical personnel
  - Meet with other contractors currently working in agency/  
program office

# Pre-RFP Activities

- If re-compete, get copy of last RFP
  - Review SOW to determine capabilities to respond
  - Identify where teaming partners may be needed – start developing relationships with companies with those areas of expertise
  - Identify key labor categories needed – start recruiting
- Identify relevant project experience to be used as past performance
  - Make sure customers are happy and will provide positive references – if problems, fix now!

# Reading, Analyzing, & Understanding the RFP

- Who needs to read it?
  - Every person on the proposal team must read the RFP
- SOW (Section C)
  - Describes work to be performed
- Instructions (Section L)
  - Provides instructions for proposal preparation & submission
    - format, content, delivery instructions
- Evaluation Criteria (Section M)
  - Describes technical and cost/price factors on which proposals will be evaluated – often “best value”

# Keeping the Proposal on Track

- Templates
  - Organize the response according to the instructions and evaluation criteria
  - Keep the response uniform in format
- Compliance Matrix
  - A table that clearly shows the requirements, where the response is located in the proposal, and who has responsibility for addressing them
  - Critical tool during many steps of the process—writing, reviewing, final production
  - Clearly defines the roles of each team member

# Keeping the Proposal on Track

- Calendar
  - Keeps the team moving on writing assignments and reviews
  - Fosters communication
- Asking Questions
  - Clarify key elements of the RFP
  - Request changes to benefit you
  - Be cautious—don't give too much information to the competition

# Keeping the Proposal on Track

- Kick-Off Meeting
  - Review contract requirements/SOW
  - Discuss team member roles & responsibilities
  - Make writing assignments
  - Review proposal schedule/deadlines
  - Discuss win themes/discriminators
- Multiple Reviews (color teams)
  - Allows a fresh set of eyes to read the proposal
  - Puts everyone in one room to determine solutions for problem areas

# Writing Guidelines

# Focus on the Agency

- Focus on the agency's needs or mission objectives stated in the RFP
  - Incorporate the information in your proposal response
  - Show you understand their needs and are offering a compliant response
  - Don't offer what you think they should have, or what you've heard they're "really looking for"

# Proposal Content

- Avoid lengthy management and corporate boilerplate
  - Provide a company overview only where requested and if it's relevant information
  - Evaluators do not have time to read unrelated information

# Proposal Content

- Keep your proposal as short as possible
  - Get to the point
  - Most RFPs have page limits
    - If not, create one for yourself before you start
      - If they do not have a page limit, **DO NOT** inquire as a question
    - Base it on the relative weights of Section M
      - 20% of the evaluation criteria should correspond to 20% of the submitted pages
- Only respond to the RFP requirements
  - Make sure you're responding according to the instructions, not in the order you think the information should be presented

# Proposal Format

- Highlight your key points
  - Use bullets, headings and subheadings, boldface type, color, borders, and anything else that will make your key points jump off the page
  - Graphics are a good way to illustrate a key point. They also reduce the monotony of only text on a page
    - They're particularly important where page limits are strict
    - A picture's worth a thousand words
    - Graphics are also easier to see the big picture especially when the written description continues for several pages.

# Some Dos

- DO use a consistent writing style
- DO use active, not passive voice
- DO make evaluation easy for the reviewers
  - Follow sections C, L, and M, and specifications, and other related areas when creating the outline
- DO acknowledge potential risk areas and discuss mitigation methods

# Some Don'ts

- DON'T try and snow the evaluator
  - Be factual
- DON'T assume a contract is wired
  - Previous contracts, incumbency or relationships with the evaluators are not licenses to produce a non-compliant response
- DON'T leave out any information
  - The proposal can only be evaluated by its contents
  - "They know that" cannot be evaluated

# Writing Persuasive Content

# Preparing to Write

- Strengths and Weaknesses
  - Have an honest discussion with the team members about what the team really has to offer
- Themes and Discriminators
  - How is your company/team different from your competitors?
  - What are the key elements of your solution?
  - What points do you want to make sure to convey to the evaluators?

# Preparing to Write

- Be Clear and Concise
  - Make factual statements
    - Use quantifiable language
      - “We have 20 years experience” instead of “we have vast experience”
  - Do not make global, ambiguous claims unless you can substantiate it via an outside source
    - “We are a world-class...”
    - “We are a global leader...”
    - “We are a unique...”

# Highlights

- If there is space, highlights can make it easier for the evaluator to review your proposal
  - Pulls the key elements from each section into a graphic or text box that the readers can see easily
  - Allows you to call out a discriminator or reiterate a theme

# Persuasive Writing

- Each claim must have proof and a feature to the potential customer
- The information must be consistent throughout the document
- Use active voice
- Do not omit information
  - Proposals are evaluated on what is included, not implied
- Respond to the RFP requirements, not what you think the agency wants or needs
  - Make reading easy for the evaluators

# Ghosting

- Ghosting can be effective to frame your proposal
  - Consider what the government is looking to see in a response or approach
  - Consider what the competition may say about you and include a response that counteracts that negative suggestion
  - If you know of a weakness of the incumbent or a key competitor, don't mention it directly but discuss your opposing strength

# Graphics

- Can communicate some ideas faster and easier than words; however, do not show information in graphic that is not also covered within the text
- Keeps the reader focused
  - Breaks of the monotony of only reading text
- Allows reader to visualize the process that you will be discussing
  - Put the graphic at the beginning of the section it relates to

# Graphics

- Check instructions to make sure they are allowed
  - If your RFP does not allow graphics, we suggest submitting a question and requesting that they be allowed
    - Be prepared in case the answer is no
    - Sometimes the information can be submitted as a table
- Make sure the graphics are consistent in design and color
- Graphics need to be professional and specific to the proposal
- Make sure that the graphics are described or introduced in the text

# Technical Proposal

- Should be organized as directed in Section L of RFP, and then rounded out with the evaluation factors and SOW
  - Remember “L, M, C” to create a compliance outline
  - Go through the rest of the RFP to determine if additional sections need to be addressed
    - Key personnel, deliverables, etc.

# Price/Cost Proposal

- Complete pricing information based Section L requirements and price/cost information specified in Section B:
  - Most common contract types:
    - Firm Fixed Price (FFP) – a fixed price to be paid for entire project or per task or deliverable
    - Time & Materials (T&M) – a fixed loaded hourly rate for time incurred by personnel in specified labor categories, plus reimbursement of other direct costs
    - Cost-Plus-Fixed-Fee (CPFF) – reimbursement of all direct and indirect costs incurred, plus a fixed amount of fee (profit)

# Past Performance

- Ensure that the projects you list are relevant to the SOW
  - Make sure that the projects are recent and within the required timeframe
  - Check with the program manager from each project to find out how the customer views your company
- Details
  - Many details are often required for past performances—contract numbers, dates of performance, contracting officer name and contact information—don't wait to the last minute to track these down
  - Double-check telephone numbers and e-mail addresses

# Conclusion

The most important thing is to

**SUBMIT THE PROPOSAL ON TIME**

**ONE MINUTE LATE IS TOO LATE**

# Questions?

→ If you have any questions or would like assistance with your proposal efforts, please contact me:

Molly Gimmel

[mgimmel@d2dinc.com](mailto:mgimmel@d2dinc.com)

301-657-4440