

PERSPECTIVE

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EXORCIZE YOUR PROPOSAL DEMONS!



The "Get-It-Out-The-Door" Demon

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This demon leads a proposal team to focus on planning, writing, and reviewing a proposal at the expense of planning and allotting enough time to produce the proposal for delivery. When the proposal is ready for production and this demon strikes, the proposal team can find itself in a mad dash to get the proposal out the door for delivery by the submittal deadline.

To avoid the errors and omissions— and heartburn— caused by this demon's time squeeze, assume that proposal production— printing, assembly, and packaging— and delivery can take more time than you think, and if something can go wrong, it will. (Mr. Murphy is a first cousin to the "Get-It-Out-The-Door"

New Perspective Feature

In this new regular feature in the *Perspective*, the Proposal Exorcist (aka Chuck Keller) will preach sermonettes about how to avoid and combat proposal demons that can haunt your proposal. His first published exorcist sermon appeared in the Fall/Winter issue of the *APMP Journal*. Chuck is owner of Keller Proposal Development & Training, President of ProposalCafe.com, and the APMP Accreditation Program Director. To suggest proposal demons for attention in future sermonettes, contact the Proposal Exorcist at kellerpdt@aol.com.

continued on next page

demon.) Do not expect work time to “expand” at the end of the proposal process, thinking you can accomplish more in a work day late in the proposal schedule than you can in a work day at the beginning. Develop a proposal preparation schedule that clearly shows all production and delivery tasks and has allotted enough time for on-time delivery of the proposal.

Based on these premises, here is how you can protect yourself and your proposal from the “Get-it-Out-the Door” demon.

■ **Do production tasks as early as possible.** Schedule and finish as many production tasks as you can early in the proposal development process. This can include the acquisition of binders, commercially pre-printed tabs, CDs/DVDs (for soft copies of the proposal) and their packaging/labeling material, sheet protectors, paper for printing, printer supplies (ink cartridges, toner, and printers), and packaging materials for proposal shipment; and the printing of the covers (front, spine, and back), custom tabs, CD/DVD labels, and boilerplate appendices/enclosures.

There are many factors that can influence your choice of proposal binders:

- Assuming you will use a three-ring binder, which allows for easier proposal assembly by the proposal team and easier disassembly by the customer for proposal evaluation, use a secure locking D-ring binder that will allow pages to lay flat and be turned easily. If the proposal will have tabs, use an angled D-ring binder to display all the tabs when the binder is closed. Choose a quality binder with rings correctly sized for the number and weight size of the volume pages.
- Determine if you will imprint the cover directly on the binder or insert the cover into the see-through sleeves of an overlay binder and how much lead time the chosen approach will require. (If you print covers in advance, avoid putting the proposal submittal date on the cover unless the RFP requires it. If you include the date and there is a proposal submittal extension, the covers will have to be re-printed with the new date.)
- If you will be sending soft copies of the proposal on a CD/DVD, decide if the media will be packaged with the document binder, which would require it to be placed in a binder pocket/sleeve, or in a container separate from the binder.

Here are some other tips as you acquire production resources in advance:

- Use a clear document protector in the front of a volume’s first page to prevent the proposal first page from sticking to the inside of the binder. The protector could be a three-hole protector sheet placed ahead of the volume’s first page or a three-hole protector with a sleeve for inserting that page.
 - Choose the weight and color of the proposal pages. Although white paper is most commonly used in proposals, think about using color pages to highlight sections of the proposal—for example, the resume section, past performance section, or the appendices/enclosures.
 - Obtain all packaging materials and shipper forms. The packaging materials can include boxes; folders; envelopes; tape; string; blank labels; and interior items, such as bubble wrap, shrink wrap, and wrapping paper.
- **Have wiggle room in the later part of the production schedule.** For a 30-day response RFP, you are likely to schedule most of your production/delivery tasks in week four of proposal development. Allow enough time during this week to overcome unexpected (and expected) obstacles, including work logjams caused by the late completion of the proposal sections/volumes. During that week, use a staggered schedule for production tasks—printing, assembly, and book checks (hard copy)—for each volume. Do not wait for the completion of the entire proposal to print, assemble, and book check a volume after its editing and layout are finished. Plan an overall proposal schedule to have the proposal ready for delivery at least three days before the due date.
- **Use a document printing plan.** Have the printing resources and materials available whether the printing is to be done internally or externally (outsourced to a vendor). Schedule and arrange the print job well in advance, ensuring that you will have enough time to deliver the files for printing, clearly define the print requirements, finish, and do an initial check (quantity and quality) of the print job, and pick up the copies for proposal assembly and book check. Do not forget to print proposal copies for your company or teammates/subcontractors. If you outsource the printing, never have the vendor assemble, book check, and

continued on next page

ship your proposal without your oversight. Have primary and back-up plans for printing, including the human and mechanical resources to get it done—especially for multi-volume proposals. By the way, the “Get-It-Out-The-Door” demon can make copiers and printers fail when you verbally berate them or when they sense your desperation to get a proposal printed. My advice: play nice with your copiers and printers, and do not let them see you sweat.

- **Use a proposal assembly and check plan.** Plan enough time to assemble and check the hard and soft copies of the proposal that will be sent to the customer. To save time, check the hard and soft proposal copies for your company and your teammates/subcontractors only after you have done so for the copies that will be sent to the customer. Use a checklist to ensure compliance with all proposal production and content requirements:

- The number of hard and soft copies of the proposal volume(s)
- The page allocations for each proposal volume, including front matter (title page, table of contents, list of figures, and compliance matrix), sections, and enclosures/appendices
- Proposal/RFP signatures, RFP amendment acknowledgments, and RFP sections that must be sent with the proposal
- Packaging, shipping, and delivery instructions for proposal submittal.

For the hard copy book check, assign a team, preferably with those who are familiar with the proposal content, to visually check the binder and each page of each customer proposal copy. Verify that the binder rings are secure and properly aligned. Ensure the presence of all required pages in each volume, and that they are readable with no wrinkles, tears, or ink/toner smears. Do not use this check as a final edit and review. However, you may find a gross typo or a factual error that has somehow survived to this point. Have a contingency plan to correct these deficiencies and insert corrected pages.

Do a soft copy check of the CD/DVD proposal copies that will be sent to the customer. Ensure that all required files have been copied, can be opened and read, and are virus-free. Ensure that the media labels are attached, and accurately reflect the content of CD/DVD.

- **Use a proposal delivery plan.** Develop and implement a proposal delivery plan. Verify that you understand all RFP requirements for the submittal deadline, including the delivery date, time, and location. When you do, here is how you can keep the “Get-It-Out-The-Door” demon off your back as you get the proposal out the door:

- Package the proposal securely and in compliance with address, packaging, and labeling instructions in the RFP. Use internal packing material to minimize the proposal jostling in the box. To prevent the binder rings from opening in transit and having pages spill as they are removed from the box by the customer, inspect to ensure binder rings are properly aligned and securely closed; use shrink wrap around the binders.
- Double check compliance with address, labeling, and packaging instructions in the RFP—then triple check compliance with the address instruction in the RFP.
- Have primary and back-up methods for proposal delivery. If your primary method is to hand carry the proposal, plan to be in the destination area the night before. If you will fly to deliver the proposal, take the proposals as carry-on items. Do not check your proposal as baggage; the “Get-It-Out-The-Door” demon enjoys seeing you arrive at an airport while your proposal arrives at another. If you plan to ship (FedEx, UPS, or USPS), know the shipper’s pick-up/drop-off and delivery schedules. Do not send multiple sets of the proposal to the customer to ensure that at least one set arrives on time. If you want to go the multiple-set route, send the primary set to the customer and a second to a trusted representative who is within easy driving distance to the customer. If you find that your proposal has not arrived as expected—and you should check with the customer or the shipper to confirm delivery—then contact your representative to hand deliver the proposal.
- Resist the temptation to deliver the proposal too early. If you have produced your proposal well before the proposal deadline, protect yourself from customers who release amendments and grant proposal extensions within a week of the proposal deadline. If you have already sent your proposal when this happens, you could be forced to contact the customer to cancel that proposal and then revise, produce, and deliver a new proposal. ■