ATTACKING 12 PROPOSAL

The Proposal Exorcist

DEMONS

by Chuck Keller, AF.APMP

Haunted by proposal demons?
Let Brother Chuck help you exorcize them.

*To my congregation of proposal brothers and sisters: as we toil to develop winning proposals, **beware of devilish proposal demons**. These demons can deceive us to use proposal practices that we think are correct, but are not, or, worse yet, to use practices we know to be incorrect.*

These demons can come in many forms with different degrees of how much they can harm your proposal. Their evil impact can range from minor inefficiencies and frustrations to the trouble-plagued, gut-wrenching proposal, known in our profession as the "proposal from hell."

My sermon today is about how to avoid or purge 12 proposal demons of different shapes and sizes that can bedevil your proposal effort. It is based on sermons that this proposal exorcist gave at two recent APMP conferences: the 2007 Southern Proposal Accents Conference and the 2008 APMP Annual Conference. To support my sermon, I will also provide quotes of wisdom and wit from a variety of sources.

Some of you may find I am "preaching to the choir" because you are well aware of these demons and their wickedness and have ways of warding them off. However, whatever your proposal skills or experience may be, I think all of you will find some value in my sermon's observations and advice.

There are many seats available in the front pews, so, my friends, I encourage you to move closer to the front. Then please open your Proposal Exorcism Handbook to Chapter 1, and I will begin.

PROPOSAL DEMON #1: THE "BARBED WIRE" DEMON

> *"I used to think it was awful that life was so unfair. Then I thought, wouldn't it be much worse if life were fair, and all the terrible things that happen to us come because we actually deserve them? So, now I take great comfort in the general hostility and unfairness of the universe."*
>
> —Marcus, *Babylon 5*

This demon lives in a "wired" Request for Proposal (RFP), a solicitation written to give competitive advantage to a contractor favored by the customer in a presumably fair procurement process. If you are the contractor (the wire-ee?) that is favored by a wired RFP, you probably do not see this type of solicitation in demonic terms. But if it is not wired for you, it can be a demon that is difficult to battle.

> "The devil made me do it."
> —Flip Wilson

The key to combating this demon is to identify the barbs in what may be a wired RFP, and when you think you are facing this demon, consider a no bid. Here are some possible signs of a wired RFP:

- Has product or service, experience, or schedule delivery requirements that can only be met by a particular bidder—and if that is you, good for you
- Asks for information that can only be provided by a particular bidder—and, again, if that is you, good for you
- Requires a firm fixed fee price for a technical product or service while providing little detail about the specifications
- Allows little time from RFP release to the proposal submittal deadline
- When you submit questions or comments to resolve the above issues, the customer seems unsympathetic to your concerns by basically responding with "what-you-see-in-the-RFP is-what-you-get" answers.

Instead of pointing to a wired RFP, these signs may just reflect a poorly written RFP, ineffective acquisition plan, or uncooperative customers who really do not know what they want or the best way to get it. Whatever the cause, it may be best for you to no bid the RFP and save your bid and proposal resources for another RFP—and other demons you have a chance of beating.

PROPOSAL DEMON #2: THE "SO WHAT?" DEMON

> *"My most important piece of advice to all you would-be writers: when you write, try to leave out all the parts readers skip."*
>
> —Elmore Leonard

Too often proposals have content that fails the "So what?" test, a failure caused by demons in the following forms:

- **Stating you're pleased or proud.** Does your customer care if you are pleased to submit the proposal or that you are proud of your product, service, or experience?
- **Claiming you understand customer needs or are committed to meeting those needs.** Stating that you understand or are committed does not prove that you do.
- **Citing an objective, philosophy, or policy.** It may be your objective, philosophy, or policy to do something, but that does not mean you do.
- **Stating something is important or crucial to do**. Rather than knowing you "share their pain," I think your customers are more interested in knowing the details of how you will meet their needs.

It is not that using the above statements is necessarily bad. What is bad is their overuse at the expense of describing the solution you are proposing to meet the customer's needs. Let the details of your solution in the proposal show that you understand and are committed. Let the details show that your solution is not just an objective, philosophy, or policy. Ironically, the devil is in the details, and details in a proposal can be good when they explain your solution and the benefit of that solution to the customer.

To attack these demons, also known as proposal fluff, stay focused on answering the 5Ws and 1H about your proposed product or service:

- **Who** will provide it, and **who** will use it?
- **What** does the customer want, and **what** work is needed to provide it?
- **When** and **where** will it be produced and delivered?
- **How** will it be produced and delivered, **how** will it benefit the customer, and **how** much will it cost?
- **Why** is it necessary, and **why** are you proposing the solution to provide it?

In answering these questions, balance your response between the extremes of "trust me" and over-commitment:

- **"Trust me"**—providing insufficient details indicating that your solution will be formed after you get the contract
- **Over-commitment**—providing details that will not and cannot be known until after you get the contract.

Find a credible point between these extremes, showing the customer that you have done your homework in analyzing their needs and developing a solution to meet those needs.

Here are some other examples of how this demon can cause your proposal to fail the "So What?" test, and what you can do to fight back:

- **Making Claims Without Proof**—When you claim superlatives, such as top quality, lower risk, and cost-effectiveness about your product or service, substantiate your claim with proof, such as citing proven experience, testing results, or customer satisfaction metrics.
- **Listing Features Without Benefits**—Link the features of your proposed solution to the benefits they will provide the customer. Do not assume customers will deduce the benefits on their own.
- **Data Dumping**—Avoid using filler material (content that is neither requested by the RFP nor provides information helpful to the proposal evaluator) because it is readily available, and you think its use will make your proposal appear more informative.
- **The 47-Years-of-Experience Syndrome**—I coined this term based on a proposal review that I supported. The review team noticed, and seemed amused by, the frequent claim in the proposal that the company had 47 years' experience. I sensed that the proposal team was told that the company's experience (47 years' worth) was a proposal theme that needed to appear in the proposal—and appear it did. The proposal theme would have been better served by focusing more on how this experience would be applied to developing and providing the product or service solution. Your company has __ (you fill in the blank) years' experience—***so what?***

"From word to deed is a great space."
—French Proverb

Learn to confront your inner proposal demons.

Proposal Demon #3: The "Writer's Block" Demon

"Writers have two main problems. One is writer's block, when the words won't come at all and the other is logorrhea, when the words come so fast that they can hardly get to the wastebasket in time."

—Cecilia Bartholomew

This demon is an occupational hazard that I believe strikes all writers—for proposals and otherwise. It prevents or slows the flow of words from your head to the document regardless of how motivated you are to write. In our business facing proposal deadlines, we cannot afford this demon to obstruct our proposal writing.

"Writing is easy. All you do is stare at a blank sheet of paper until drops of blood fall from on your forehead."
–Gene Fowler

Here is how to defeat this demon and get your words flowing:

- **Follow the Outline/Storyboard.** Use these planning devices to provide a starting point for your writing. Stay focused on what you planned to write even if you have not collected all the information you need to do so.
- **Review the Capture Management/ Strategy Plan and Proposal Themes.** Amplify your proposal content by addressing the proposal strategies and themes developed during your capture management/strategy planning.
- **Answer the 5Ws and 1H Questions.** Provide details for answering the who, what, when, where, how, and why questions about your proposal solution. Answering these questions can force the words to flow, plus provide customers with information they need to evaluate your proposal.
- **Write Quickly and In Any Order.** Do not try to write the perfect first draft. Write it quickly, and then iteratively revise. Trying to write the perfect first draft can cause writing paralysis and impede the writing process. Also, do not get locked into starting at the beginning of your section assignment. Begin writing in any part of the section if it can help you begin writing.
- **Write About What You Know Best or Have the Most Interest.** Make it easier to start your writing by taking advantage of your knowledge and interests. Write content that requires no research or data collection on your part. Write about topics that you know the most about or appeal to your interest. Writing can be much easier when you actually know what you are writing about and enjoy the topic. Unfortunately, knowing and enjoying your topic are not always prerequisites for being assigned to write a proposal section.
- **Note What You Intend to Write.** Even if you do not have the details for your writing assignment, at least write down what you intend to write as a placeholder for referral later.
- **Write Introductions, Summaries, and Conclusion Later.** It can be unproductive to write section or volume introductions, summaries, and conclusions without knowing the details that are to be introduced, summarized, and concluded. Therefore, delay writing these overviews until you know the details on which they will be based. Writing an introduction, summary, or conclusion that describes a work-in-progress proposal can be fruitless and squander valuable time.
- **Just Start; When Stuck, Take a Break.** Start writing no matter how unmotivated, unprepared, or weary you may be. When I do not feel like writing, I find that if I force myself to start, it does not take long for my creative juices to flow, albeit sometimes in a very weak trickle. When the words do not come or you are just tired of writing, stop, take a short break, and resume when you have recharged your writing battery.
- **Use a Thesaurus and Dictionary.** Stuck for the right word or tired of using the same word repeatedly? Use a thesaurus and dictionary to bring clarity and variety to your writing.

- **Verbally Explain What You Want to Write.** When you have trouble expressing yourself on paper, step away from the keyboard, and tell a colleague what you are trying to convey. You may find that talking will help you organize and initially express your thoughts more effectively than through writing.
- **Write What You Would Like to Know If You Were the Evaluator.** Think like your anticipated proposal evaluators. If you were evaluating the proposal, what would you need to know? Purists may caution you to provide only what is asked for in the RFP. However, I believe evaluators have personal questions (unstated requirements, if you will) they would like addressed in the proposal over and above (and in between) the information required by the RFP. If you can answer these questions, you may get a better evaluation grade.
- **Start With Boilerplate and Revise.** Start with content from other proposals or other reference documentation, and tailor it based on the RFP requirements. However, beware of the "Boilerplate Special Indigestion" demon that I will describe next.

Feed your "Boilerplate Special Indigestion" Demon at the Vortext in Atlanta, GA.

Proposal Demon #4: the "Boilerplate Special Indigestion" demon

> *"Knowledge is of two kinds. We know a subject ourselves, or we know where we can find information on it."*
>
> —Samuel Johnson

The starting point for many proposal writers is to use boilerplate information from old proposals or other reference documents. However, boilerplate can be a mixed blessing. Yes, it can kick start your writing. However, without enough tailoring to the needs of the customer, a boilerplate-heavy proposal can appear to offer a generic one-size-fits-all solution for any customer. This is not the impression you want in a customer-focused proposal.

Here are ways to settle upset stomachs—burp! (pardon me)—caused by this demon:

- **Follow Your Writing Plan.** Follow the approved outline or storyboard for your section, including the use of the proposal strategies and themes developed during your capture management/strategy planning. Fit the boilerplate to your outline and not vice versa.
- **Answer the 5Ws and 1H Questions.** Answer these questions to describe your solution for the proposed product or service that meets the needs of the customer.
- **Cite Experience.** Cite examples of your experience, such as case studies, quality performance examples, and lessons learned of relevant work, to substantiate your ability to provide the proposed solution.
- **Assess Risk.** Present a risk assessment and mitigation plan to show your understanding of the technical, management, schedule, and cost risks of providing the solution.
- **Mention the Customer.** Use the customer's name in the proposal, while, of course, deleting other customer names from the proposal boilerplate. Explain the customer's role in how you will manage the delivery of the proposed product or service.

- **Be Accurate and Understand What You Use.** Verify the accuracy of the boilerplate. It may be inaccurate because it is now out-of-date—assuming it was accurate when first used—or was not true when originally used. Only use boilerplate that you understand. I once asked someone the meaning of something he had provided for a proposal. His response was he did not know; he had taken it from another source. If you do not understand something in your proposal, how do you expect the customer to do so?
- **Use a Boilerplate Archive.** Build and maintain a boilerplate archive (an automated or manual system) that organizes topics, into easily accessible modules. For example, rather than keep a collection of management sections or volumes as reference boilerplate, divide this boilerplate into specific topics, such as project organization, communication plans, financial and budgetary planning, and reports. Store personnel resumes (for key personnel sections) and information about current and past contracts (for past performance/relevant experience sections), and regularly update this information to reflect changes in personnel or contract status. If your proposals often answer the same basic questions from RFPs, place core answers to these questions in your archive and tailor the answer to meet the requirements of the RFP.

Have a biolerplate archive but do not try to carry it all at once, or you will face the wrath of not one but two demons.

> "This is the challenge of writing. You have to be very emotionally engaged in what you're doing, or it comes out flat. You can't fake your way through this."
> —Real Live Preacher, RealLivePreacher.com Weblog

Proposal Demon #5: The "Lazy List" Demon

"Laziness is nothing more than the habit of resting before you get tired."
—Jules Renard

My late mother spoke of a person carrying a lazy load—hand-carrying a large load in one trip when it would have been better to make the transfer in more than one trip. Her point was that it was laziness that led the person (me?) to avoid multiple carries.

Laziness can also affect proposal writing. I think it can be seen in what I call the "lazy list"—a bulleted list that provides little information and leaves wasted space on a page. Here is an example.

"Acme Corporation will provide the following reports:

- Staffing report
- Budget report
- Inventory report
- Schedule report
- Quality report."

It is not that this list has no useful information. The problem is that it misses the opportunity to provide amplifying details about the reports and fails to efficiently use the page space. In a full-page layout, the frequent use of cryptic bulleted lists can waste space and make it hard to produce a page-limited proposal. Do not get me wrong; there is a place for bulleted lists in a proposal, for they can convey important information and allow proposal evaluators to pick out key points while skimming a proposal. If you use them, ensure that they are "data rich" with useful information.

So how can you tame this demon? When you use a "lazy list," think tables. Taking my example, you could convert it into the informative table shown in Figure 1. If you did, it might have pleased my mother.

Report	Submittal Date	Originating Department	Recipient	Purpose
Staffing	Weekly	HR	CO and Project Manager	Names, positions, and weekly labor hours of all assigned contractor personnel
Budget	Monthly	Finance	CO and Project Manager	Budget expended, budget available, and explanation of budget variances
Inventory	Monthly	Material	Project Manager	Inventory of all vehicles, hardware, tools, and test equipment
Schedule	Monthly	Project Management	Project Management	Milestone status of most recently completed month amplified with a narrative summary of performance
Quality	Quarterly	QA/QC	Project Manager and Quality Officer	Quality inspection results and corrective actions, minutes of quality improvement meetings, and risk assessment of next month's milestones

Figure 1. The "Lazy List" example was converted to an informative table.

Proposal Demon #6: The "Skeleton-in-the-Closet" Demon

"Honesty is the best policy—when there is money in it."

—Mark Twain

If your business has never had or will never have a weakness in your product, service, or in the performance of providing either, this demon poses no threat to you. However, for those who have had lapses in the quality of their work—and I think that includes most, if not all, of us—keep listening.

Simply stated, if you have a weakness (a skeleton in the closet) as you prepare your proposal: (1) acknowledge it, (2) resolve or mitigate it, and (3) have a plan to prevent its recurrence. The following amplifies how to rid your closet of these demons and prevent their return:

- **Be Candid With Yourself.** Perform a truthful assessment of your weaknesses and strengths during your capture management/strategy planning. Once identified, do not ignore a weakness or hope your customer will not know about it. Assuming that your customer knows your weakness can be just the incentive you need to resolve or mitigate it for the proposal.
- **Attack Your Weakness.** Analyze the cause of the weakness, and develop a plan to resolve or mitigate weakness as you prepare the proposal. By doing so, you may be able to turn a weakness into a strength or, if you cannot totally resolve it, at least offset the impact.
- **Do Not Repeat It.** Develop a plan to prevent the weakness from occurring again. Learn from your mistakes.

One of the most common skeletons in the closet can appear in a proposal's past performance section. The RFP requirements for describing past performance contracts may force you to cite work in which you have faced a technical, management, schedule, or cost problem. This is an example of where taking the three-step approach to address a weakness would be appropriate: acknowledge the performance weakness, describe what caused the weakness and how you resolved it, and explain what you did to prevent it from happening again. The RFP proposal instructions, especially if they are from the Federal Government, may encourage such an approach to address contract issues. Telling your side of the story can offset a poor past performance evaluation submitted by a customer that you have cited as a past performance reference. You should have resolved the problem for this customer and have a successful approach to preventing its recurrence before addressing it in the proposal.

If you are sure that the customer knows about your weakness, address it with the three-step approach. If you think the customer perceives that you have a weakness and you do not, address it by explaining why it never existed.

However, if you are sure that the customer does not know about the weakness—and you are not forced to address it by RFP instructions—it may be prudent not to analyze and describe the weakness in the proposal. That does not mean you should not first conduct the three-step process for that weakness. You may find that, with some creative strategizing and risk mitigation, you can overcome or mitigate the weakness, allowing you to report it as strength in the proposal.

What happens if you identify a weakness, but are unable to resolve or mitigate it? Well, you have got a problem. But at least you know what may be a good reason to no bid or, if you decide to bid, know why you may not win the contract.

"The Exorcist" Stairs, Georgetown, Washington, DC.

Proposal Demon #7: The "Busy or Weak Writing SME" Demon

"An expert knows all the answers—if you ask the right questions."

—Author Unknown

An important contributor to proposals can be the subject matter experts (SMEs) who have limited proposal writing skills or time to exercise whatever skills they do have on a proposal. The demon here is how to get proposal information from a writing- and time-challenged SME. Assault this demon with sound preparation and collection techniques.

The following are recommendations for preparing the SMEs to provide the information:

- **Perform Training.** Conduct proposal training for the SMEs. Workload permitting, they could receive training between proposals or right before it is needed (just-in-time) during proposal development.
- **Prepare With a Heads-up.** Provide the SMEs early notice of the support you need from them and when it will be needed. This will give them time to fit the proposal work into their schedule. Then if you find that an SME will not be available when needed, you will have time to look for a replacement.
- **Supply RFP Material.** Give SMEs a copy of the RFP and a detailed section outline of their assigned section with a cross-reference to the applicable RFP sections. Discuss with them their role and what information you need from them.

If you find that SMEs cannot or will not take responsibility for the writing assignment and that you have prepared them as per my recommendations, use the following approaches to collect the needed information:

- **Interview**—Ask the SMEs questions in an oral interview. After the interview, write a draft, and provide it to them for review and written revision.

- **Written Questions**—Provide written questions for the SMEs to answer in writing.
- **Boilerplate**—Provide boilerplate or other reference information to SMEs for review and written revision.
- **Review and Revision**—Write an initial draft, and provide it to the SMEs for review and written revision.

When you do the above, allow time to go back to the SMEs to clarify their inputs, obtain additional information, and have them review the resulting section draft for accuracy and completeness. Always have the SME conduct this review.

Proposal Demon #8: The "Incumbent–itis" Demon

"Arrogance is a kingdom without a crown."
—American Proverb

Always ask for a proposal debrief whether you win or lose.

As difficult as it can be to win a contract the first time, it can be even more challenging for an incumbent contractor to win a recompete of that contract. This demon can instill an incumbent with an inflated confidence about its chances to win a recompete for a contract it currently serves and serves well. This confidence—arrogance, if you will—can lead an incumbent to put less effort in its proposal than it should.

Here is how you can counter this demon, and increase the likelihood of winning a recompete contract:

- **Perform in Current Work.** One of the best ways to win as an incumbent is to perform well in the current job. Give your customer tangible reasons for keeping your people and company around, and earn yourself a performance record that you can extol in your proposal.
- **Remember Proposal Lessons Learned.** Analyze and apply lessons learned from the proposal you submitted for the current contract. What were its strengths and weaknesses when it was reviewed by the Red Team or when you were debriefed by the customer about your winning proposal? Oh, you did not get a proposal debrief? Always ask for a proposal debrief whether you win or lose.
- **Provide RFP Assistance.** If possible, and if it does not preclude you from bidding on the re-compete, help the customer develop the recompete RFP. If you do, you can become familiar with the RFP before it is released and possibly influence the RFP with work performance or proposal preparation requirements that will favor your company. Can you say wired RFP? It can also allow you to get a head-start in planning your recompete proposal. Getting an early start in your proposal planning is a good idea for any proposal whether or not you are the incumbent.
- **Assess Why There Is a Recompete.** Determine why there is a recompete and ensure that the reason(s) influence your capture management/strategy planning. Is there a recompete because of your poor performance as the incumbent, or is it because it is just time for a recompete due to the pending end of the current contract and has nothing to do with your performance?
- **Evaluate Your Competition.** Take your competition seriously by doing a frank assessment of their strengths and weaknesses as part of your capture management/strategy planning. In your proposal, offset your competitors' strengths and exploit their weaknesses. Do not underestimate competitor abilities or overestimate yours because you are the incumbent.
- **Show Your Knowledge of the Customer.** In your proposal, provide specific examples of your experience and performance in your current contract. Describe what you have done, substantiating your proven performance and understanding of the work, and how this experience will be applied as a benefit for the recompete contract. Provide background details in the proposal that only an incumbent could provide. Based on your knowledge of key customer personnel, determine who might be evaluating the proposal—and write the proposal with these people in mind as your proposal audience.

- **Offer Continuity *and* Improvement.** As the incumbent emphasize your legacy knowledge and ability to provide staff and service continuity from the current contract to the proposed one. However, consider proposing changes to show that you are looking to enhance your performance while maintaining the good product or service you have been providing. Offering your plans for product or service improvements could offset the improvements proposed by your competition. However, you might have the challenge of explaining in the proposal why these proposed improvements were not made for the current contract.
- **Assemble a Knowledgeable Proposal Team.** Use SMEs familiar with current contract work to develop the recompete proposal. Admittedly, this could be difficult to arrange; they may be too busy serving the current contract to work on the proposal. Regardless, do your best to get them involved so their knowledge of the customer and the current work is reflected in the proposal. In the proposal, ensure that these SMEs do not focus on what ***is*** being done on the current contract at the expense of what ***will*** be done for the new contract. Current work requirements and procedures—familiar to the SMEs—may be different for the new contract.

> [as the incumbent] be reluctant to ask for a proposal submittal extension.

- **Do Not Help Your Competition.** As the incumbent, you should have a much better understanding than your competition about the customer's needs and requirements and how to meet them. Do not weaken this advantage by asking the customer questions that could lead to answers more helpful to your competition. Because of your in-depth knowledge of the customer and work requirements, your question may address a problem, solution, or other issue of which your competition is unaware. Be reluctant to ask for a proposal submittal extension. If you—as the incumbent—are struggling to produce a compliant and competitive proposal on time, your competition might be struggling even more. An extension could prove more helpful to your competition.

Proposal Demon #9: The "L and M Disconnect" Demon

"When we seek for connection, we restore the world to wholeness. Our seemingly separate lives become meaningful as we discover how truly necessary we are to each other."

—Margaret Wheatley

In a Federal RFP, Section L provides proposal preparation instructions, including the topics to be addressed in the proposal, and Section M describes how the proposal content will be evaluated. It seems logical to expect that there would be a close correlation between the proposal content and the content that will be evaluated for the proposal grade. However, this demon can lead to an illogical disconnect between the guidelines in these two RFP sections.

To address this demon, I will focus on Sections L and M disconnects in Federal Government RFPs. However, this demon can infest commercial, state, or local RFPs that do not use Sections L and M as the designations for the proposal instruction and evaluation sections.

There are two disconnect demons you may face, and here is what you can do to respond to them:

The Section L and Section M demons may often be at odds.

- **Section L Asks For Content That Section M Does Not Indicate Will Be Evaluated.** Realize that this may be not be an RFP mistake for a customer may want information that it will not formally grade. For example, you can expect that even if Section L asks for an Executive Summary, the Executive Summary will not appear as an evaluation factor in Section M. Apparently the Federal Government believes that anything in the Executive Summary should be in other parts of the proposal that will be evaluated. For this disconnect, either provide the requested content (to play it safe) or, before you do, ask the customer if the content is required although it willl not be evaluated.
- **Section M Identifies Content That Will Be Evaluated, While Section L Does Not Ask For This Content.** Of the two disconnects, I think this one has the greatest chance of being an RFP mistake. For this disconnect, either address the Section M content within the framework of the summary proposal outline dictated by Section L (again to play it safe) or, before you do, ask the customer if this evaluation topic really needs to be addressed in the proposal.

In either case, you could address the disconnected topic in your proposal without asking the customer for clarification, or provide the information only if the customer directs you to do so in response to your question for clarification. It is your call.

As you plan your proposal, remember the following priority of RFP sections for outlining the proposal:

1. Section L (proposal instructions)—use to develop the summary proposal outline
2. Section M (evaluation criteria)—integrate and subordinate topics within the summary outline dictated by Section L
3. Section C (specifications such as a statement of work or performance work statement)—integrate and subordinate topics within the outline dictated by Section L and amplified by Section M.

By the way, if you ever respond to any RFP that includes only equivalent Sections M and C, organize the proposal outline by Section M and integrate and subordinate Section C topics into the outline driven by Section M. This will ensure that you address all topics to be evaluated, something you might not do if you outlined the proposal based on Section C.

Proposal Demon #10: The "So Much to Write, So Little Space" Demon

> *"It usually takes a long time to find a shorter way."*
>
> —Anonymous

This demon appears in RFPs that impose page limitations in the proposal. Here are tips for cutting this demon down to size and fitting what you need in a page-limited proposal:

- **Plan Page Allocations.** During proposal outlining, set page targets for each proposal section with the cumulative total not to exceed the page allowance. If you know up front the number of pages you can work with in your section, you will find it easier to stay within the page allocation than writing what you think you need and then trimming. If you find that you do not have enough pages, consult with your proposal manager to reconsider your page allocation.
- **Use Graphics.** Use graphics that, compared to text, can reduce the space needed to address a topic in the proposal. Develop graphics that will allow you to trim details that otherwise would be provided in text. Normally an RFP will allow you to use a smaller type size in graphics. This requirement can be very useful in graphic callouts and tables using type sizes down to 8 point. compared to 11 or 12 point. type often used for text.
- **Use Layout and Typographical Options.** Pick the most space-efficient selections for the proposal margin, indent, font, and spacing (between characters—condensing and kerning—and between lines). Of course, use styles that comply with the RFP proposal instructions. You can also cut the length of a proposal by simply using one space after a sentence-ending period instead of two spaces. An easy way to do this when using Microsoft® Word is to use the "Find and Replace" function.

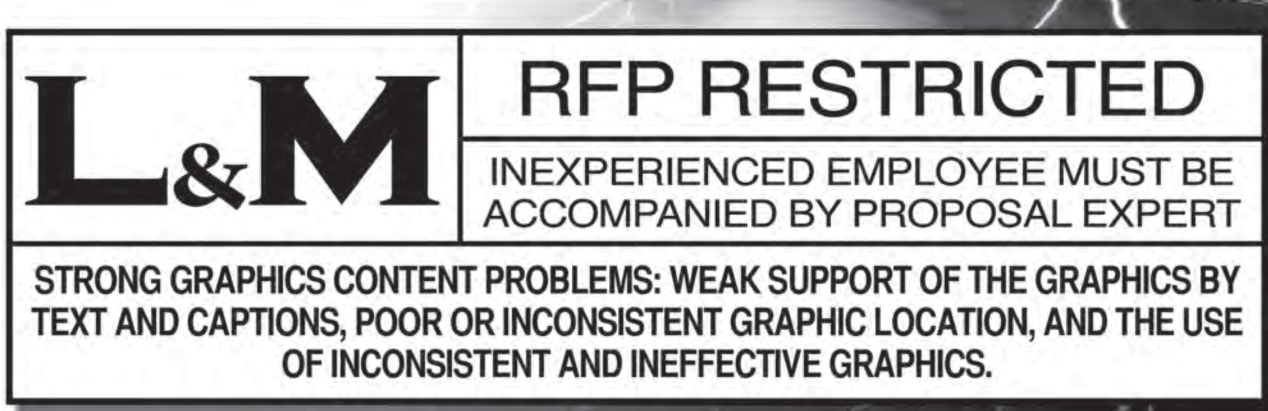
- **Make Referrals.** Rather than repeating content that has already been included in the proposal, refer the evaluator to that section for the information. However, if you think evaluators will not have access to the referred section, it might be best to repeat the content to ensure that they see it.
- **Be Smart About Content Placement.** Instead of placing information in page limited parts of the proposal, place it in the proposal where pages are not limited.
- **Offer to Make Details Available.** For content that could be helpful, but not absolutely necessary, indicate that it is available if desired by the customer.

In addition to the above space-saving techniques, I recommend you apply different levels of responsiveness in your proposal. The level of detail, and the space needed to provide it, can vary to be responsive to the proposal instructions and product or service specifications. There are three levels of responsiveness that you can use, going from the most detailed to the least:

- **Level 1**—Provide a detailed response to explain your proposed solution—answering the previously described 5Ws and 1H questions—or to respond to a specific RFP request for information. This is the most typical and effective approach for responding to the proposal instruction section of an RFP. It is the approach that we proposal professionals should see as the standard for our proposal content.
- **Level 2**—Commit to comply with an RFP requirement without amplifying your response with the answers to the 5Ws and 1H questions. You simply restate the requirement or identify the requirement and where it appears in the RFP, and then indicate that you will meet this requirement. For example: RFP Section C.3.7 requires that your proposed product must operate in various environmental conditions, such as wind, temperature, humidity, precipitation, and altitude. Instead of describing the design features that allow your product to operate in these conditions, you state it will meet all required environmental conditions, listing what the specific requirements are or referring to the environmental requirements in Section C.3.7.
- **Level 3**—State that you take no exceptions or deviations to a requirement without describing the requirement or your approach (the answers to the 5Ws and 1H questions) to meet the requirement. For example: to indicate compliance with contractual clauses in the RFP, you state that you take no exceptions or deviations to the clauses.

Write to the appropriate level based on your best judgment and your understanding of the RFP's proposal instructions.

Instead of placing information in page limited parts of the proposal, place it in the proposal where pages are not limited.



Proposal Demon #11: The "Every Picture Does Not Tell a Story" Demon

"So remember, every picture tells a story don't it"

—from the song "Every Picture Tells a Story" composed by Rod Stewart and Ron Wood

With all due respect to the rockers, Rod and Ron, there are many pictures in proposals that do not tell a story.

There are three basic problems that this demon can cause: (1) weak support of the graphics by text and captions, (2) poor or inconsistent graphic location, and (3) the use of inconsistent and ineffective graphics. This, of course, assumes that your proposal has graphics, the absence of which is a proposal problem caused by a cousin of this demon.

> *"A picture says more than a thousands words, but which words are these?"*
> *—Taeke de Jong*

Here are some ways to have your proposal "picture" tell your "story:"

- **Use Referrals and Captions.** Ensure every graphic has an introduction referral in the text. Introduce each graphic with an identifier (number, alpha-numeric, or letter) and a summary of its purpose or key point(s). Give each graphic an identifier and a caption, preferably an action caption that provides the key point(s) of the graphic. Use a consistent style for referrals, identifiers, and captions. Avoid the "throw-away" referral, which simply directs the evaluator to a graphic with a *"(see Figure x)"* with no description of the graphic's purpose or content. Graphics without introduction referrals or captions may be acceptable in a brochure, in magazine and newspaper articles, and even in a journal article, but not in a proposal document when it is important to make your point clearly and quickly.

- **Consider Graphic Location.** Place the graphic as close as you can after its first referral in the text. As a general rule for layout consistency, anchor less-than-full-page graphics at the top or bottom of a page. If you want the evaluator to alternate between text and a graphic that supports the text (as you might want in describing a complicated process or a company's organizational structure): (1) ensure that the graphic is placed so the evaluator's eyes can easily move between it and the text, and (2) when you have a graphic that supports a text description (such as a complicated process), refer to the graphic early in that description.
- **Use a Consistent Graphic Style.** Having graphic consistency can be challenging when graphics are developed by different people using a variety of software programs, such as Adobe Illustrator, Microsoft Excel, Microsoft Visio, Microsoft PowerPoint, and Microsoft Word. Nevertheless, set and enforce a consistent style for each type of proposal graphic. For example, have standards for type size and font family, color, rules (line width and style), shapes, such as those used in flow diagrams and organization charts, and the styles for tables, bar charts, pie charts, and graphs.
- **Avoid Eye Candy.** Have a purpose for each graphic. Do not use graphics just because they look good. Avoid cutesy clip art that has the look of comic book illustrations. I think this type of clip art can be appropriate in a PowerPoint presentation, but not in a formal business proposal. Avoid a bland, boilerplate appearance, such as a photo of people shaking hands or assembled in a meeting in which the attendees look like models posing for the camera.

> *"Don't mind criticism. If it is untrue, disregard it; if unfair, keep from irritation; if it is ignorant, smile; if it is justified it is not criticism, learn from it."*
> *—Author Unknown*

Proposal Demon #12: The "Red Team Responsibility Blues" Demon

> *"Action springs not from thought, but from a readiness for responsibility."*
> —Dietrich Bonhoeffer

This demon can lead to the failure of those who review ***and*** develop proposals to meet the following responsibilities:

- The responsibility of the Red Team to identify not only proposal deficiencies during its formal review, but to offer feasible recommendations for fixing the deficiencies
- The responsibility of the proposal team to consider carefully all Red Team recommendations and to implement accepted recommendations into the proposal.

Let us first address Red Team responsibilities. It should go without saying that these responsibilities should include becoming familiar with the associated RFP, including amendments, before the review; and understanding reviewer assignments, the factors that will be used to evaluate the proposal, and how the review process will be scheduled and managed. As important as these planning tasks are and the demons that can plague them, they are topics for another sermon. For today, I will focus on the responsibility of documenting review comments and recommendations for proposal team use.

I suggest that the review team document its findings using a form like the one in Figure 2. It can be a hard copy form completed by hand or a soft copy filled out in a Word file. I will highlight three key parts of the form to be filled in by the reviewer.

- **"Deficiency Description/Question" and "Recommendation"**—Use these blocks to address issues, such as identifying a discrepancy, asking a question, or requesting clarification, and to offer a recommendation for resolving the issue. It is not enough for reviewers to identify proposal problems; require reviewers to recommend specific and actionable remedies to solve them.

- **"Reviewer Log Number"**—Use this block to identify reviewer comments and recommendations for tracking and disposition. A simple approach is to have reviewers log each of their inputs with their initials and a number in ascending order.

Have the proposal team use the **"Disposition"** blocks for analyzing the reviewer recommendations and deciding whether to implement them. The blocks reflect that reviewers can make recommendations that should, should not, or cannot be accepted, and that ultimately it is the decision of the proposal team to implement the recommendations. The decision can lead to one of four dispositions.

- **Accept**—The recommendation is valid and will be implemented.
- **Reject**—The recommendation is rejected because it is wrong, inappropriate, unfeasible, or impossible to implement.
- **Optional**—The recommendation is valid; however, it is not considered critical to the success of the proposal. Therefore, the decision to implement is left to the discretion of the assigned proposal writer.
- **Research**—The recommendation could be valid based on more analysis, and if it is determined to be valid, it will be processed as an "Accept" or "Optional" disposition.

When a disposition decision has been made and the form marked accordingly, track the disposition to completion.

I know many reviewers like to make review comments and recommendations directly in the hard or soft copy of the proposal. However, compared to using the recommended form, I think inserting review comments in a proposal draft increases the chance of getting cryptic reviewer inputs with little or no detail about the proposal deficiency or how to fix it. Plus, widely dispersed comments in the lines or margins of a proposal can make it difficult for the proposal team to collect and evaluate these inputs and make sound decisions about whether to implement the recommended changes.

DISPOSITION:	ACCEPT	REJECT	OPTIONAL	RESEARCH
PROPOSAL SECTION AND TOPIC:				
APPLICABLE RFP SECTION:				
DEFICIENCY DESCRIPTION/QUESTION:				
RECOMMENDATION:				
REVIEWER:	REVIEWER PHONE/E-MAIL:	REVIEWER LOG #:		

Figure 2. Use this form for collecting and analyzing review comments/recommendations.

For reviewers who prefer to make their review comments directly into the proposal, I suggest that you use this method to note and organize your initial review thoughts, and to correct typos and make editing suggestions (although a Red Team review should not focus on editing). Then, transfer and translate your comments from the proposal draft to the review form for reporting what you consider major issues. The forms and the marked up proposal drafts can then be given to the proposal team for its use.

Regardless of how you document and evaluate Red Team review comments, both the reviewers and proposal staff have a responsibility as a team to produce the most compliant, compelling, and credible proposal they can.

> *"The devil hath power To assume a pleasing shape"*
> *—William Shakespeare, Hamlet*

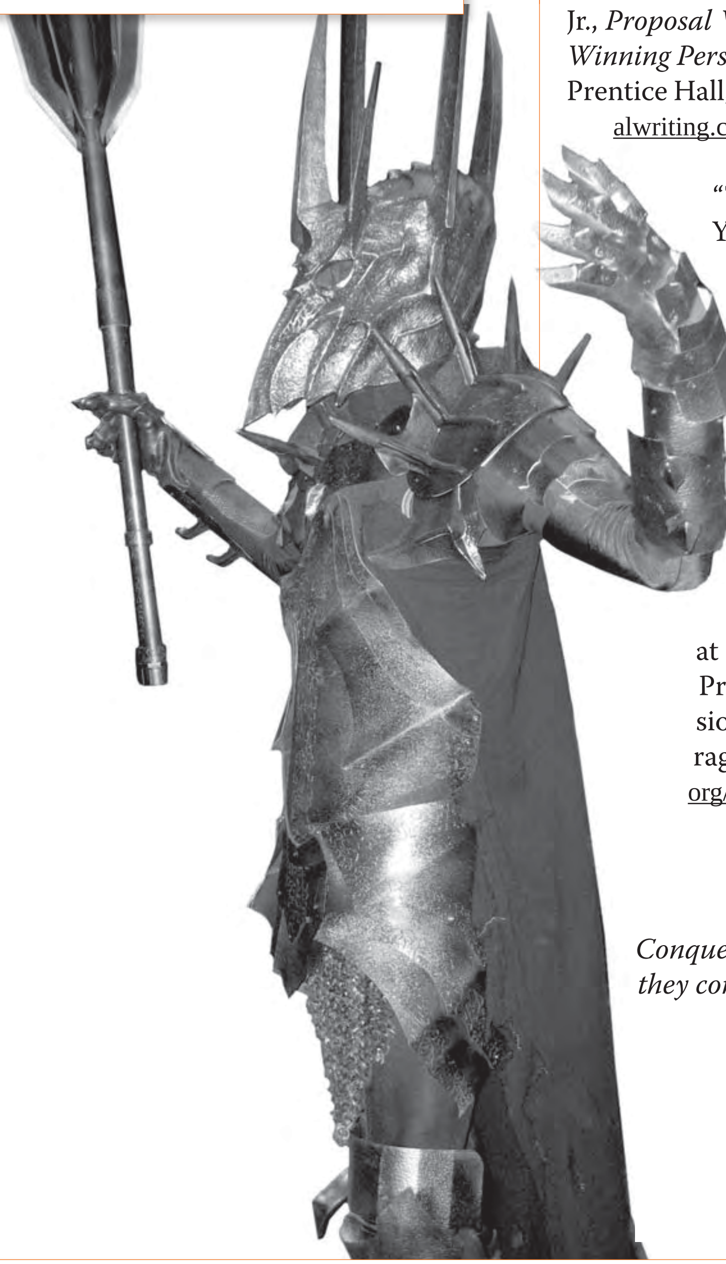
Amen

So my friends, after addressing this twelfth demon, I will conclude my sermon for today. Please heed my warning about their evils and my advice about avoiding and purging them from your proposals. Spread my message of action to our proposal brothers and sisters who did not attend the sermon. Be aware that there are more proposal demons than the ones I described today. However, if you can conquer these 12, I think your proposal work will be easier and more effective.

It is the sincere wish of this proposal exorcist that you go forth to where proposals from hell are few and winning proposals are many. Amen!

Beware this demon as he can lead to the failure of the review team and the proposal development team.

> *"Work and struggle and never accept an evil that you can change."*
> *—Andre Gide*



References:

All attributed quotes, except for the "Every Picture Tells a Story" lyric, came from *The Quotations Page* (www.quotationspage.com).

William S. Pfeiffer and Charles H. Keller, Jr., *Proposal Writing: The Art of Friendly and Winning Persuasion* (Upper Saddle River, NJ: Prentice Hall, 2000) (www.prenhall.com/proposalwriting.com).

"The Proposal Exorcist: Exorcise Your Proposal Demons," a presentation by Chuck Keller at the 11th Annual Southern Proposal Accents Conference, Chapel Hill, NC; October 11, 2007 (www.apmp-spac.com/2007/docs/Keller_Chuck.pdf).

"The Proposal Exorcist: Purging Proposal Demons," a presentation by Chuck Keller at the 19th Annual Association of Proposal Management Professionals Conference, Rancho Mirage, CA; May 28, 2008 (www.apmp.org/fv-732.aspx).

Conquer your proposal demons before they conquer your next proposal!

Chuck Keller has been in the proposal profession for 25 years. He is the owner of Keller Proposal Development & Training, a consulting business in Pensacola, FL, and the President and co-founder of ProposalCafe.com, a Website for those who develop government, commercial, or grant proposals. An APMP Fellow and charter member, Mr. Keller serves as the APMP Accreditation Program Director. He is the co-author of the book *Proposal Writing: the Art of Friendly and Winning Persuasion* by Pfeiffer and Keller. Chuck has a BS (journalism), MS (technical communication), and an MBA. Mr. Keller can be contacted at kellerpdt@aol.com or chuck@proposalcafe.com.