

EXORCIZE YOUR PROPOSAL DEMONS!

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The ? Demon



Requests for proposal (RFPs) can be written poorly or have requirements that you can't—or don't want to—comply with. To “fix” these types of RFPs, send customer questions to clarify RFP content or recommendations to change RFP requirements more to your liking.

How do you write these questions or recommendations (collectively referred to as “comments”) to get what you want without confusing, irritating, or belittling the customer or helping your competition? To do so, you must overcome the ? Demon. (This proposal demon once had a proper name, but like the musician, Prince, chose to be referred to as a symbol. And before you ask: no, this demon isn't related to the Riddler, the Batman nemesis.)

To meet the challenge of this proposal demon, the Proposal Exorcist offers reasons to submit comments about an RFP, and recommends how to collect, review, write, and submit them.

- **Analyze the RFP.**

Does the RFP clearly explain the following?

- ▶ Required content, format, and layout of the proposal, including pricing instructions
- ▶ Proposal delivery and packaging instructions (when, to where, and whom)
- ▶ Specifications of the requested product/service, including contractual clauses
- ▶ Process and criteria for evaluating the proposal for award.

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Proposal Demons (Continued)

If it doesn't, ask for clarification.

Does the RFP have any of the following deficiencies?

- ▶ Missing or misnumbered content, including attachments, pages, numbered sections, or words.
- ▶ Contradictory statements especially in proposal instructions or product/service specifications.
- ▶ Ambiguous, vague, or otherwise confusing statements or requirements.
- ▶ Misspellings, typos, or unfamiliar terms or nomenclature that leaves in you doubt about the customer's meaning.

If it does, ask for clarification.

By the way, the Proposal Exorcist thinks in today's world of electronic RFPs, compared to the old days of paper RFPs, it can be harder to recognize that an RFP is incomplete. This can be particularly true if it's divided into many files—some Word and others Acrobat PDF—and then posted on a Website for downloading. When dealing with such an RFP, carefully check that all of its parts are posted and downloaded and its files contain what they are supposed to contain. If the RFP has a table of contents, as you would see in the SF33 of a Federal Government RFP, verify that you have all RFP parts indicated in the table of contents.

Does the RFP contain proposal content or delivery requirements or product/service specifications that put you at a competitive disadvantage?

If so, ask for a requirement or specification change that is favorable to you.

You can expect the customer preferring not to change the RFP after formally releasing it. It's best to try influencing RFP content before it's formally released by helping the customer draft it or by commenting on a draft RFP distributed by the customer for industry review and comment. If after formal RFP release you don't expect the customer to change RFP requirements in your favor—and you must have this change to have any chance of winning—your question might not be about which comments you should send to the customer but rather if you should even bid.

After your RFP analysis, here are recommendations for communicating with the customer about the RFP and keeping the ? Demon in check.

• Follow customer instructions (as much as you can).

Follow customer guidance for format, content, and delivery method (for example, hard copy via mail or fax or soft copy via email) and deadline, and the point of contact (POC) for receiving inputs. For a 30-day turnaround RFP, expect to have about 7-10 days after RFP release to submit your comments so customers have enough time to respond and distribute their replies well before the proposal submittal deadline—and before a post-RFP proposal conference. Expect customers to distribute all comments and replies to all prospective bidders either providing the comments verbatim from each prospective bidder or paraphrased representing a similar comment made by more than one prospective bidder.

Minimize your (and the customer's) administrative work of processing comments by submitting one comments package per deadline. Meet this deadline, but if you have a comment after the deadline, send it. Maybe the customer won't accept or respond to your comment if past the deadline. But you don't give the customer the opportunity to do so, one way or another, unless you send it.

For a pressing question for which you need a quick answer, consider asking the customer POC by phone. Let the customer decide if it wants to answer, and if the question and answer will be formally documented with an RFP amendment and shared with your competitors. For your protection and the customer, the Proposal Exorcist thinks it best that any customer answers you get for questions over the phone be formalized in an RFP amendment.

If customers accept comments about the RFP at post-RFP proposal conferences, don't make comments in a conference group setting with the customer and your competition that could give your competition intelligence about your proposal strategy or strengths and weaknesses. If you have questions arise at the proposal conference, consider submitting them in writing after the conference. However, do provide comments at one-on-one meetings between you and the customer at these conferences.

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Proposal Demons (Continued)

- **Set and follow a procedure to collect and review comments.**

Use a standard process for collecting, screening, and writing your RFP comments with enough time to meet the submittal deadline. Collect comments in a standard form with the following blocks:

- ▶ Applicable RFP section and page (Don't make customers find the applicable RFP sections on their own.)
- ▶ RFP topic
- ▶ Background of question or recommendation
- ▶ Question
- ▶ Recommendation with rationale
- ▶ Name and contact info (phone number and e-mail address) of the originator (This information is for internal use only, not for the customer. You may need to contact the originator to amplify or clarify the comment before deciding to send it.)

Collect and review the forms to determine if the comments should be sent.

- ▶ Ensure the question isn't answered in the RFP. (Don't ask a question that the customer can answer with a referral to an RFP section or page.)
- ▶ Ask a question one time and one way. (Different RFP reviewers might ask the same question more than once. Don't make the customer answer the question more than once.)
- ▶ Ask only the question that you need answered and in a way that you get the answer you need. (See the next recommendation for more details.)

For the comments you decide to submit, transfer them from the form into the chosen format/media, and revise and edit them as necessary. (Comply with customer requirements for comment format/media.) Take as much care in terms of clarity, conciseness, and proper grammar, writing the comments as you should do when writing the proposal.

- **Ask for and get what you need.**

Have a competitive reason for the comment either to clarify your understanding of the RFP or to change it to your favor. If you have no comment, don't invent one just to show the customer your interest in the solicitation.

Also, don't nitpick the customer by pointing out typos or misspellings when it's clear what the customer meant.

Although you may have a legitimate comment about the RFP, it may be to your advantage not to submit it if you fear the response might be the one you don't want or one that might help your competition more than you. Here are some examples in which no comment might be best route.

- ▶ The RFP has no performance specification for an aspect of the product/service. You question if there's such a standard and the customer responds with one—and it's one you can't meet. (It might be better to ignore the absence of a specification or in your proposal offer one that best meets your capability.)
- ▶ The RFP does have a performance specification for an aspect of the product/service. You ask the customer to clarify or amplify specification, and the customer responds with a more stringent specification than the original. (It might be better to propose compliance with the original specification without giving the customer the chance to make it stricter.)
- ▶ As the incumbent, you see that the RFP is vague or has no detail about a product/service specification that you know is critical based on your experience—an issue which your competition may not be aware of or understand. You ask to clarify the specification and the customer responds and by doing so informs your competition about the specification. (It might be better not to ask about the specification and in your proposal (1) accept what the RFP states or doesn't state, or (2) clarify the specification based on your experience, and not alert your competition about the issue.)
- ▶ The RFP has a performance specification that could be interpreted in two ways: one to your advantage and the other to your disadvantage. You ask for clarification, and the customer responds with an interpretation to your disadvantage. (It might be better not to ask for clarification but instead have your proposal reflect the specification to your advantage and explain your interpretation.)

If you have a comment that you'd like to submit but are reluctant to do so for whatever reason, you could decide not submit it with the hope that a competitor will. That comes with the chance that the comment won't be submitted, and hoping isn't a strong strategy for winning pro-

posals. If you really have a comment that you need to send to the customer to be competitive, submit it.

If you decide to submit a question, craft it to get the answer you need. The Proposal Exorcist likes the approach offered by Carl Dickson of CapturePlanning.com about how to ask customers about RFPs. In his “Coping with a Bad RFP,” www.captureplanning.com/articles/27933.cfm, he advises to have your questions lead the customer to answer with a:

- ▶ Yes or no response
- ▶ Numerical response
- ▶ Response of narrative clarification
- ▶ Selection of an answer from a list potential answers you provide.

If you decide to recommend an RFP change, don't justify it by explaining only how it will help your bid. Explain how the change will help the customer get the product or service its soliciting in the RFP.

- **Sanitize your inputs.**

Unless otherwise stated by your customer, assume your comments and the associated customer responses will be given to all prospective bidders. Don't put anything in your comment that allows your competition to identify your company as the originator. Let the customer know your company was the originator in the transmittal letter/note for the submittal; just don't identify yourself in the body of the comment.

Even if your company is invisible in your comments, avoid any information in them that could give other prospective bidders potentially helpful information such as:

- ▶ Benefits, strengths, or weaknesses about your proposed technical, management (including teaming and subcontracting), and pricing approaches—or options you are considering.
- ▶ Information your competition may not know or have privy to; for example, your knowledge of a re-compete contract that you're pursuing as an incumbent or information that you've gained through effective marketing research or from your teammates, subcontractors, or vendors.

Knowing this information, even without knowing its source, might provide your competition with beneficial strategic or tactical intelligence.

Don't submit comments that hang “dirty laundry” in front of your customers and run the risk of hurting your competitive image with them. For example, be careful about how you refer (if you must even mention them) to weaknesses or problems that you're facing in the development of the product/service solution or the preparation of the proposal.

- **Be tactful and professional.**

Don't let your frustration with the procurement process, RFP requirements, or the customer's behavior impact the tone (or actual content) of your comments. You might think the subject RFP is the worst one you've ever read or that the customer has been uncooperative during the procurement process and really doesn't know what it wants. The customer may be “guilty on all counts.” However, this doesn't justify your communicating with the customer in an insulting, ridiculing, lecturing, arrogant, or sarcastic way. Indicating your superiority and the customer's incompetence isn't the way to win new (or old) business. Stay focused on accomplishing what you want with your comments—and professionally communicating with the customer.

- **Read and heed all questions and answers, and follow up as required.**

When you receive the customer's response, typically in an RFP amendment, don't concentrate just on the comments you submitted. Carefully analyze all comments and responses. Try to match inputs to your competitors and determine what they tell you strategically or tactically about your competitors. As you should map RFP requirements to your proposal outline in a requirements or compliance matrix, cross-reference the comments and responses to the applicable sections in your proposal. Customer responses can significantly change or clarify your (and the customer's) understanding of original RFP requirements, and you need to ensure that your proposal reflects all of these changes/clarifications. If the customer responses lead you to more comments about the RFP or if you have new unrelated ones, submit them even if the customer doesn't specifically authorize it.

So that's how the Proposal Exorcist recommends you answer the ? Demon. May all your RFP questions and recommendations get the customer response you want or need.

Any questions?