

EXORCIZE YOUR PROPOSAL DEMONS!

By Chuck Keller, the Proposal Exorcist; AF.APMP

The Consultant-Client Conflict Demon



Those who manage and write proposals often face stress that can cause personal and organizational conflict. It's not surprising that this conflict can strike – and jeopardize proposal success – considering stress is common when trying to write a winning proposal in a challenging, team, and schedule-driven environment.

Conflict can affect everyone on a company's proposal team, including subcontractors and proposal consultants. It's tough enough for a company to run an effective proposal team when its proposal resources are employees it knows, manages, and controls (or at least thinks it controls). Add "outsider" subcontractors and consultants who are unfamiliar to the team, and it can be even tougher.

My last sermon explained how to forge a strong prime contractor and subcontractor relationship by fighting the Sunken Sub Demon. This time, the Proposal Exorcist confronts a proposal demon that wrecks the working relationship of proposal consultants and their clients: the Consultant-Client Conflict (CCC) Demon (known as "C-Cubed" to his friends). This sermon will explain how to fend off this demon through preparation, planning, and teamwork by both the consultant and client.

Let's first identify good and bad reasons for a client to hire a proposal consultant and then the warning signs that the CCC Demon has brainwashed the prospective client.

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Proposal Demons (Continued)

- **Good reasons** – (1) to supplement its in-house proposal organization and staff, and (2) to get proposal support when it has no internal proposal resources or skills. (These are good reasons if the client commits to actively engage in the proposal process and to provide the resources, cooperation, and time to produce a competitive proposal.)
- **Bad reasons** – (1) to salvage a bad or incomplete proposal at the last minute before proposal delivery deadline, and (2) to delegate proposal development to a consultant because the client is too busy or lacks the proposal skills to be actively involved in proposal development. (These are bad reasons for they can unfairly place a consultant in a position as miracle worker, and due to a lack of client support, set up the consultant—and the proposal—for failure.)

Here's a warning for consultants: consider the CCC Demon lurking if, while discussing the client's needs and interest in hiring you, the prospective client says the following.

- **“The proposal will be easy to write, you can mostly use boilerplate from our old proposals and technical documents.”** (CCC Demon-speak: I don't understand the work required for a responsive and competitive proposal and will expect you to write the proposal with little or no support/input from me other than what I can find that's already written.)
- **“I need you to write the proposal because we don't have the employees to do it.”** (CCC Demon-speak: it will be your job to write the proposal with little or no support/input from us, because my staff and I have no proposal skills, have more pressing things to do, or just don't want to work on the proposal.)
- **“The proposal is basically written; I just need you to edit it.”** (CCC Demon-speak: I have an unrealistic view of the quality, responsiveness, and completeness of the draft proposal, and after dumping the proposal on you, I'll expect you to clean up the mess with a remedial edit using pithy prose and marketing pizzazz.)
- **“How long will it take and cost for you to write the proposal?”** (CCC Demon-speak: Although appearing to ask a reasonable question, I'm showing that I'm ignoring that many factors beyond your awareness or control can

determine the time required to write a proposal. These factors include the (1) level and timeliness of support from me and my staff; (2) availability of usable boilerplate from me; (3) complexity of the proposal instructions and product/service specifications in the RFP—and the resulting complexity and size of the proposal; (4) maturity of my product/service to be proposed; (5) number of RFP amendments; and maybe more importantly (6) time available to write the proposal. Without your knowledge or control of these factors, I'm unreasonably expecting you to give me an accurate fixed fee quote for proposal services.)

- **“Will you work on commission to be paid only if the proposal wins?”** (CCC Demon-speak: I need your help, but have no money to pay you. This means that even if you do a great job on the proposal and it loses through no fault of your own, you won't get paid. I see it as a way for us to share risk and reward, with me getting you to share as much risk as possible before there's reward. If you agree to this offer, making your pay contingent on winning could make you work harder than you would if you were assured of getting paid win or lose.)

Here are more warnings for consultants—don't help the CCC Demon by:

- Claiming to have skills that you don't or committing to do something that you won't or can't. (Advice for clients—carefully screen consultants for duty, allotting enough time to find, interview, and qualify consultants well in advance of needing them. Consider pre-qualifying a “stable” of consultants when you don't need them, so you won't have to recruit and screen consultants when you do and will have back-up options when a preferred pre-qualified consultant isn't available to work your proposal.)
- Using any proposal content that you produced for another client or otherwise came from another client's proposal, unless, in the unlikely case, that client gave you permission to do so. (Advice for clients—regardless of the legal or ethical issues with this practice, here's a good reason for not using this type of content or using the services of a consultant who would provide it: answer the question—would I want consultants giving my proposal content to their other clients?)

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Proposal Demons (Continued)

Now let's assume that the client clearly understands its proposal needs, has found and vetted a qualified consultant to meet those needs, and commits whatever resources are needed to support the consultant—and, therefore, the proposal. Then it's time for the consultant and client to prepare for and plan their proposal relationship, and to work as a team.

- **Agree on what services/resources the consultant and client will provide.** As part of this planning, agree to the proposal processes and tools that will be used and how the consultant will be integrated into the client's organizational structure and proposal team. Don't plan to figure out your roles, processes, tools, and management interfaces as you go. (Later, this sermon will have more to say about consultant-client integration and teamwork.)

If the consultant is hired to be the proposal manager, ensure that the client and consultant define the proposal manager's role the same way. To put it in terms for a team sport: will the role be like a baseball manager who manages and directs the team, or like a player-manager who not only manages and directs the team, but plays in the game? (The CCC Demon is delighted when the client expects the consultant proposal manager to manage, write, review, edit, and illustrate, while the consultant expects just to tell the client what needs to be done and to serve as a schedule "enforcer.")

Both should also know if the proposal consultant is expected to be a proposal development expert and subject matter expert (SME) for the client's product/service. (However, the Proposal Exorcist believes that a proposal consultant doesn't have to be a SME to be an effective proposal manager or writer.)

- **Agree on when and for how long the consultant service will be needed.** Of course, base the decision on the scope of the needed services and the proposal preparation schedule. Will the service require full-time or part-time support, or a mix of full-time and part-time support? Will the work include services through and after proposal delivery, including an extended work schedule caused by the customer extension of the proposal delivery deadline?

Advice to consultants – If you will have outside work during the agreed-to period, be up-front with your

clients. Inform them of this outside work, and if it could make you unavailable at times, assure them this work won't prevent you from serving any of your clients. As a consultant, if you can't make this assurance, don't accept the prospective job.

- **Agree on where the consultant will work.** Will the needed service require the consultant to work on-site at the client's facility or at another facility designated by the client? Will it allow a consultant to work off-site remotely at the consultant's office? (Using the telephone and Internet for virtual proposal services can be very effective and save the client big money by not having to pay consultant travel and lodging expenses.) Will it be a mix of on-site and off-site work, realizing that some proposal work is best done with the client and consultant face-to-face, while at other times this personal interaction isn't needed? For on-site or off-site work, agree to the consultant's work schedule be it a daily schedule with set start and stop times or a flex schedule with start and stop times dictated by the day's work requirements.
- **Agree on what and when the consultant will be paid.** Will the consultant be paid by the hour, day, or a fixed fee? What travel expenses will be paid, such as car rental, air fares, parking, lodging, and food? For extended consulting periods on-site at the client's facility, will the client pay travel expenses to allow the consultant to periodically return home? Will the consultant be paid weekly, bi-weekly, monthly, or after the proposal is done? In what form and how often will the consultant have to report hours worked to the client? What documentation will be required to accompany the consultant's invoice for labor and travel expenses?

Advice to the consultant – If you offer proposal services to the client based on a not-to-exceed (NTE) work hour total and a fixed fee, include in your quote a qualifier that states the fixed fee is subject to increase if you expend more than the quoted NTE work hours due to circumstances beyond your control, such as customer RFP amendments and proposal extensions, lack of client cooperation developing the proposal, extensive "repair" work caused by proposal problems caused by others on the proposal team, and client expansion of your role. (The CCC Demon takes great pleasure in consultant-client battles over pay.)

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Proposal Demons (Continued)

- **Ensure that all required administrative work is completed before the proposal work begins.** This can include the following.
 - ▶ Documenting in a consultant agreement—signed by both parties—with the terms and conditions of the consultant-client agreements previously described.
 - ▶ Authorizing a purchase order to commit client funding for payment to the consultant.
 - ▶ Signing of a non-disclosure agreement in which the consultant agrees not to divulge proprietary data of the client.
 - ▶ Signing a non-compete agreement in which the consultant agrees not to work for a client's competitor for a designated period after the subject consulting job is finished.
 - ▶ Authorizing and providing for a consultant security badge/parking pass, or consultant use of client online resources, such as e-mail, other Internet services, and inside the firewall server, including access to a virtual proposal center and online proposal document and reference archives.
 - ▶ Filling out and signing of a W-9 IRS form by the consultant. (To verify that the consultant is an independent contractor, and, therefore, can certify exemption from backup withholding on the W-9 form, see www.irs.gov/taxtopics/tc762.html.)
- **Finally, work together as team, with the client integrating the consultant in the client's proposal staff and organizational structure. Here are some recommendations for the client.**
 - ▶ Get your proposal team to “buy in” to the use of the consultant. Introduce the consultant to your employees and other consultants, explaining the consultant's role and the need for them to cooperate with and support the consultant. (Don't let the CCC Demon whisper to your employees that your use of a consultant shows that you lack confidence in their ability or you want to circumvent their authority and responsibilities.)
 - ▶ Ensure that everyone on the proposal team understands who the proposal manager is, be it the consultant or one of the client's employees. If the consultant will be your proposal manager, allow the consultant to help screen and select other consultants you may need. And if a consultant is your proposal manager, never give final responsibility for proposal content to that consultant for that is a client's responsibility.
 - ▶ Get the consultant up to speed on what has—and hasn't—been done on the proposal, work with the consultant to develop a proposal preparation schedule, and commit your resources and support to meet this schedule.
 - ▶ If the consultant will work off-site, develop a consultant-client plan for online and off-line communication and how proposal documentation/reference material will be accessed, transferred, stored, and controlled.
 - ▶ Set a clear escalation path to resolve proposal issues raised by the consultant or other proposal team members. Ensure consultants understand who they report to in your organizational structure and proposal team, and who has the authority and responsibility to resolve a problem between the consultant and your staff and other consultants. (Advice for consultants—understand that the client is boss, and you're the advisor. If you recommend an action, state your case, and if the client disagrees, the client's way trumps yours.)

Ultimately, the true measure of a successful consultant-client relationship will be the success of the resulting proposal. The chance of success will increase if the client and consultant avoid or at least minimize conflict by preparing and planning well, working as a team, and keeping the CCC Demon off that team.

Oh, and a final note: to keep the peace in your proposal work, never let the CCC Demon make the coffee, control the proposal center thermostat, or pick the toppings when ordering pizza for the proposal team.

A final, final note: This sermon drew heavily from a presentation (“Consultants & Their Clients: Getting the Most Bang from Hired Proposal ‘Guns’”) that the Proposal Exorcist and Keith Propst gave at the 17th Annual APMP conference in New Orleans. The Proposal Exorcist thanks Keith, an APMP Fellow, for his contribution to that presentation and this sermon.