

EXORCIZE YOUR PROPOSAL DEMONS!

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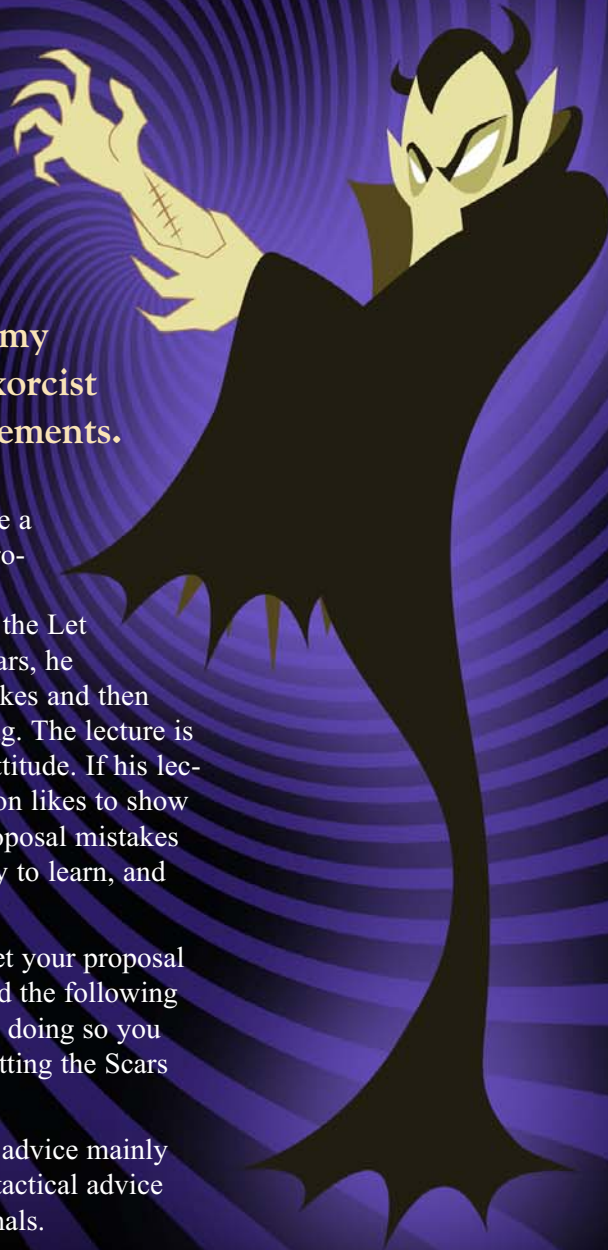
The Let Me Show You My Scars Demon

It's said that experience is the best teacher, and you learn by your mistakes. Based on my 27 years' proposal experience (and my share of mistakes), the Proposal Exorcist can attest to the truth of these statements.

Learning through experience and mistakes can be a long and hard road as you travel through your proposal development career. There's a proposal demon that would like you to take that road: it's the Let Me Show You My Scars Demon. Nicknamed Scars, he enjoys seeing proposal professionals make mistakes and then smugly lecturing them about what they did wrong. The lecture is accented by a mocking how-dumb-can-you-be attitude. If his lecturing and attitude weren't bad enough, the demon likes to show his scars that he proudly claims represent the proposal mistakes he's caused over time. It's not a constructive way to learn, and his scars are a gruesome sight.

If you're new to the proposal profession, don't get your proposal education through the Scars Demon. Instead, heed the following advice from the Proposal Exorcist, who hopes by doing so you can minimize your proposal mistakes to avoid getting the Scars Demon lecture and seeing his scars.

My advice comes in two categories: (1) strategic advice mainly for those new to the proposal profession and (2) tactical advice for both new and old (older?) proposal professionals.



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Proposal Demons (Continued)

First, here's *strategic advice* for promoting a long, healthy, and successful proposal development career.

- **Do you have what it takes?** Honestly assess if you have the personal skills, traits, and work ethic to meet the demands of proposal work. Regardless of your proposal skills, to be successful in the profession I think you should be a good communicator (writing and orally) who's competitive, goal-oriented, and somewhat obsessive (with attention to detail). These traits should be augmented by a bulldog attitude of doing whatever it takes to get the job done in a deadline environment. *(If you prefer eight-hour work days with weekends off, and don't like to be driven by schedules, proposal work can be a poor and short-lived career choice.)*
- **Cross-train.** Proposal work is often seen as an exercise in proposal writing. It is. However, winning proposals require so much more: marketing, capture management, customer needs and RFP analysis, competitive assessment, proposal team management and coordination, document control, scheduling, reviewing, editing, illustration, document layout and production, negotiation, pricing, and oral presentations, to name a few. To enhance your proposal ability and value to your employer, cross-train by developing your skills in all phases of proposal development. See yourself as a proposal development professional, not just a proposal writer.
- **Be a team player.** Very few proposals are produced by just one person. Therefore, view proposal development as a team sport. Develop your skills to contribute as a member of a proposal team, learning to lead and follow as a productive and supportive team member.
- **Manage stress.** Offset the stress that results from a demanding job that can come with long hours, tight schedules, uncooperative proposal team members, and the basic challenge of convincing someone to buy your product or service. Stress can lead to burnout, a common occupational hazard in the proposal profession. Although the Proposal Exorcist is not a psychologist or medical doctor, I recommend the following:
 - ▶ Exercise regularly, get adequate sleep, and eat right. If you drink alcohol, drink in moderation. *(The Proposal Exorcist won't speculate on whether proposal development work leads to the overindulgence of alcohol.)*
 - ▶ Have personal interests and activities outside work.
 - ▶ Forge friendships with the people you work with; camaraderie with your proposal co-workers can help your working relationship with them.
 - ▶ Stay connected with your family and friends, and do your best to leave your proposal work behind when you're on your own time.
 - ▶ Don't worry about things you can't control.
 - ▶ Regardless of how demanding (and stressful) a proposal is, realize that work on that proposal will eventually end.
- **Be a proposal student.** Take advantage of the many training resources that can improve your proposal development skills. These resources include workshops and seminars offered by proposal training companies, presentations at APMP events (conference-type events and chapter meetings), proposal publications (books and the APMP *Journal* and *Perspective*), the APMP Body of Knowledge, the APMP Forum (online), and the many varied proposal tips and instructions available via the Internet.
- **Support the APMP.** Actively support the APMP by doing more than just paying your annual dues (or having your employer pay them). Nurture your professional development, reputation, and credibility by contributing to the APMP and proposal profession and building your network of proposal colleagues.
 - ▶ Attend APMP events (conference, training day, symposium, seminar, or chapter meeting), and encourage your proposal colleagues to attend with you and to join the APMP.
 - ▶ On a local level, affiliate with an APMP chapter and serve as a chapter officer or committee member, and on an international level, serve on the APMP Board of Directors.
 - ▶ Share your proposal knowledge and experience with other APMP members by giving presentations

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at APMP events, contributing to APMP Forum, and writing articles for the *APMP Journal* and *Perspective*.

- ▶ Promote the APMP Accreditation Program by telling your colleagues and employer about it, and take advantage of the program by becoming accredited.

(By the way, building a strong professional network through the APMP can prove very beneficial if you find yourself between jobs seeking permanent or consultant/contract employment.)

Now here's a mixed bag of **tactical advice**, some admittedly off-beat, that can help novice and grizzled proposal professionals, alike, in their proposal development work.

- As a proposal manager:
 - ▶ Be selective in the proposal battles you fight. Do what's right, but limit your choice of battles to those you think you can win and that offer benefits worthy of the fight. As a proposal manager, you have limited time and personal capital in your management budget; spend it wisely.
 - ▶ Set priorities. In a tight proposal schedule, some tasks are more important than others. Learn to identify tasks in three categories in the following descending order of importance: (1) tasks that absolutely need to be done, (2) tasks that aren't necessary but would be good to do time permitting, and (3) tasks that seem needed but would have no adverse impact on the finished proposal if they aren't done. Perform proposal triage, and focus your energy on the higher priority tasks.
 - ▶ Avoid "serial paralysis." Many tasks must be performed to go from proposal start to proposal submittal. Many of them are serial in that they must be performed sequentially for you to proceed. Don't let your work become paralyzed because you can't perform a task in a series of dependent tasks. When you hit a serial task roadblock, think parallel. Look for and deal with other tasks that need attention, and later return to the unfinished serial task.
 - ▶ Realize that there's usually more than one good way to do something. Your way isn't always the best and only way.
 - ▶ Know when to stop. There's a point when more polishing of the proposal isn't warranted by the resulting gain of that work. There's no such thing as a perfect proposal. Your goal shouldn't be to produce the perfect proposal, but to produce the best proposal you can in the allotted time with the resources you have available.
- Know when to replace someone on the proposal team who's not producing or is causing obstacles to finishing the proposal.
- In your proposal toolkit, have a proven approach to working with subject matter experts who must contribute to a proposal, but have limited proposal or writing skills, time to contribute to the proposal, or interest in helping the proposal.
- Unless prohibited by the customer or the RFP, always submit an executive summary or introduction and summary with your proposal.
- Avoid reading the executive summary or introduction and summary after proposal submittal. It will spare you the agony of finding a typo, grammatical error, or misspelling within the first three pages of the section, no matter how many times you have proofed, edited, and spell checked it.
- The reliability of hardware (printer, copier, and computers) is inversely proportional to your need for it to work and how close you are to the proposal deadline. To maintain a good relationship with your hardware, treat it with respect and don't let it see you sweat. *(Also, be nice to the supporting software.)*
- Proposal tasks will take longer than you think during the week leading up to proposal submittal. Time doesn't expand: a day during the last week of a proposal preparation schedule has 24 hours just like a day during the first week of the schedule.
- Treat each proposal as a must-win proposal; if you can't, don't do it.
- If you really need a proposal submittal extension, ask the customer for one. About the worst that can happen is that the customer will say no.

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- When developing your proposal win strategy, don't underestimate your competition's abilities or overestimate yours.
- The best proposal win strategy as an incumbent on a recompete procurement is to perform well on the contract being recompeted.
- Never TBD the project/program manager in a proposal's management volume or section.
- A wired RFP is an RFP written to favor a specific bidder. If the RFP is wired for you, good for you. If it's wired for your competition, that's not so good, and you should strongly consider a no bid.
- Also, strongly consider a no bid in the following situations:
 - ▶ If it's more than three days after the RFP release and you haven't made a bid/no-bid decision for the solicitation. (*Consider this advice my proposal spin of the wit and wisdom of Ben Franklin: "Fish and guests smell in three days."*)
 - ▶ If you think the customer will first learn about your company when it reads your proposal.
 - ▶ If you can't think of anything that would discriminate your offer from your competition and your proposal win strategy is based only on your ability to provide the requested product or service.
 - ▶ If you're working on a proposal and think that the worst thing that can happen is for you to win that proposal.
- Using boilerplate in a proposal can be a mixed blessing. Properly tailored for the subject customer's needs, it can save you time producing the proposal. Not properly tailored, it can give customers the impression that your proposal is a one-size-fits-all effort and that you have little concern for their needs.
- If you're allowed by customers to submit questions about their RFP after it's been released, don't submit questions just to show them your interest in the solicitation. Ask questions only if you really need the answers.
- Don't depend on emails from a Federal Government customer to inform you that an RFP amendment has been released. Check for amendments by monitoring the customer's Website at least daily.
- Hope isn't a good proposal win strategy.
- As a client, know when to fire your proposal consultant. As a proposal consultant, know when to fire your client.
- If you don't have time to plan a winning strategy and prepare a responsive and compliant proposal outline, you don't have time to do the proposal.
- Allocate enough time to perform a proposal edit. How much time you'll need will depend on the scope of that edit. For example, a grammar, spelling, and style edit can take a long time, while a basic edit for grammar and spelling likely won't.
- Developing a proposal without a proposal preparation schedule is like driving cross country without a roadmap or GPS. As you prepare your proposal preparation schedule:
 - ▶ Always have "wiggle room" in it to allow recovery from the missed deadlines of key proposal tasks.
 - ▶ Unless absolutely necessary, don't plan a seven-day work week; if you do and find you still need more work time, you can't go to an eight-day work week.
 - ▶ Schedule the aforementioned proposal edit even if you don't know if you'll have time for it. If you find that you don't, at least run the proposal through a spell check.
 - ▶ Never schedule the proposal signoff authority review the day before the proposal is due and when you'll have little time to fix any problems found by said authority.
- "Show-the-flag" proposals are proposals that have little chance of winning, but are submitted anyway because you want to show the customers that you're interested in doing business with them in the future. Don't submit "show-the-flag" proposals.

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- “Shot gun” proposals are based on the strategy of submitting proposals regardless of their win probability with the hope that if you bid on enough opportunities, you’re bound to win something. Don’t follow a “shot gun” proposal strategy.
- If you can’t answer the question “so what?” to justify something you’ve put in your proposal, don’t use it.
- If you claim in your proposal that you’re pleased or proud about something, assume that the customer won’t care.
- If you have to lose a bid, lose because your proposal didn’t offer the right product or service for the right price. There’s no excuse for losing because you failed to follow RFP instructions. *(If you’re the type of person who tries to assemble or operate things without using the instruction manual, the Proposal Exorcist questions your suitability for proposal work.)*
- If you win, lose, or draw with a proposal, ask the customer for a proposal debrief, looking for what you did well, and not so well, in the proposal.
- Write like you’ll be charged a dollar for every needless word and syllable used.
- Learn to generate an automatic table of contents in your word processing program. It can save you time and reduce errors.
- Plan at least one graphic for every two pages of a proposal. When you use proposal graphics, ensure that they have a purpose other than they look good.
- In your proposal text, use a single space after periods instead of double spaces. You might be surprised how much space that can save you in a page-limited proposal.
- As you prepare for proposal submittal, double check that the proposal has all the required signatures and that you have the correct address for proposal delivery.
- Always have a back-up plan for proposal delivery. If you travel by air for proposal hand delivery, don’t check the proposal (or required copies of it) as luggage.
- “Trust me” proposals describe what you’ll do for the customer, but not the who, when, where, how, and the why of your proposed product or service. If you submit this type of proposal, don’t expect the customer to trust you.
- Don’t take constructive criticism of your proposal section as a personal attack; consider it as an opportunity to improve the proposal.

So that’s Proposal Exorcist’s advice to avoid the Scars Demon. Regardless of what (and whose) proposal advice you take and how much proposal experience you have, you’re human. You’ll make mistakes. Therefore, here’s my final bit of advice: learn by your mistakes. And if you do, I hope that the Scars Demon cuts you some slack and doesn’t show you his scars.