

# EXORCIZE YOUR PROPOSAL DEMONS!

By Chuck Keller, the Proposal Exorcist; AF.APMP

## The Time Flies Demon

**W**hen things aren't going well during the development of a proposal, the proposal delivery deadline can approach very quickly. The Time Flies Demon prefers this pace as he tries to sabotage your proposal progress and obstruct submittal of an on-time and competitive proposal.



The Time Flies Demon is a protégé of the Time Flies When You're Having Fun Demon. However, the latter let his demon business license expire because he couldn't find enough fun proposals to work, concluding that the term "fun proposal" can be an oxymoron.

This Proposal Exorcist sermon won't examine if and how proposals can be fun. Rather, it will address how to make and use a proposal preparation schedule—and keep the Time Flies Demon out of your proposal time zone.

(Although I think proposal schedules should be used for both solicited and unsolicited proposals, the sermon will focus on schedules for solicited proposals.)

How long should it take to produce a proposal, and what factors can affect the structure and milestones of a proposal schedule? My answer to the first part of this question would be like the one I'd give if asked how much water

continued on next page

## Proposal Demons (Continued)

does it take to fill a glass: it depends on the size of the glass. For a proposal, my answer is: it depends on how much time you have to deliver the proposal. Use your turnaround time fully and productively while assuming your competition will whether you do or not. Don't do your competition any favors by not taking full advantage of all the time you have for the proposal.

There are many more factors than the time allowed for proposal turnaround that can impact your schedule, including the following:

- Proposal development staff, tools, and processes you use that can affect your proposal work productivity
- Complexity and number of RFP requirements for proposal instructions that can affect proposal content and size
- Complexity and number of RFP requirements for the requested product/service that can affect the time needed to form a solution (it can take longer to write a proposal when you must develop an "original" solution than it does to write a proposal with an "off-the-shelf" solution)
- Number and location of proposal team members, sub-contractors, and teammates, who can affect how much proposal management, coordination, and communication effort are needed to develop the proposal.

With a given turnaround time, how should a proposal schedule be phased and the time be allocated within those phases? The following is a good rule of thumb for phase allocations to develop a proposal with up to a one-month turnaround time:

- Phase 1 – RFP analysis and proposal strategizing, planning, and outlining (25% of the total time)
- Phase 2 – Proposal writing and illustration (25% of the total time)
- Phase 3 – Proposal review and revision (25% of the total time)
- Phase 4 – Proposal final edit, layout, and printing; document assembly, book check, and packaging; and proposal shipment and delivery (25% of the total time).

With this phase and allocation approach, expect to use only about half of your time writing, reviewing, and revising the proposal.

How can this phasing and allocation be applied in practice? For a one-month turnaround, it would mean about one week per phase and for a one-week turnaround about two days per phase. For a turnaround of two-to-three days, you might use phases measured in half days or by the hour of the day. (If you face this kind of short-fused proposal, please accept the Proposal Exorcist's sympathy.) For a proposal with a month-plus turnaround, it might mean that you could allocate more time for Phase 2 and Phase 3 work.

Caution: Don't let the Time Flies Demon lead you to steal time from Phase 1 or Phase 4 "to pay" for Phase 2 or Phase 3 tasks. The following are signs that the demon is pushing phase pilfering:

- For a Phase 1 theft, the demon says, "You don't have time to plan or outline the proposal; you need to start writing."
- For a Phase 4 theft, the demon says, "Don't worry about meeting the final draft deadline; you can make up for the busted deadline by having the production group work overtime."

If you can't schedule your proposal tasks with this phase and allocation approach because you don't have enough time to perform each phase fully, you have at least seven options for tailoring your proposal development plan and schedule, which are:

- 1 Do some tasks before the RFP is released
- 2 Do some tasks more efficiently and quickly
- 3 Do some tasks more quickly and less efficiently
- 4 Add more proposal development staff to do the work
- 5 Let some tasks go undone
- 6 Add more hours to the work day and/or the days of the work week
- 7 Overlap tasks so they can be done in parallel rather than in serial sequence.

(You could also no bid, but let's not give up too easily.)

The Proposal Exorcist admits that it's much easier listing these seven options than implementing them. Be that as it may, I'll address ways to implement the last three options.

continued on next page

## Proposal Demons (Continued)

- ▶ If you must cut corners in your schedule, do “proposal triage” by grouping tasks into 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 real positive or negative impact on the proposal if they aren’t done. Then limit yourself to performing only the most important tasks with the greatest payoff within the constraints of the time available.
- ▶ Schedule a work week of 7 days or a work day of more than 10 hours only if necessary. With work weeks of 7 days and work days of 10-plus hours, if you need more time, you can add more daily hours (to a point of diminishing return), but you can’t extend the work week to 8 days. The Time Flies Demon likes 70-hour work weeks because they can cause the proposal team to burn out. He also likes mandatory weekend work because it can encourage proposal team members to waste time during the regular week because they feel they can catch up working on the weekend.
- ▶ Look for ways to schedule tasks in parallel rather than in series. There are many tasks that must be performed to go from proposal start to proposal delivery. Some tasks are done in parallel, independently from other tasks. Others are dependent tasks; they are done sequentially in a series. Don’t let your work become paralyzed because you can’t perform one task in a series of dependent tasks. When the Time Flies Demon tries to infect you with “serial paralysis,” think parallel. Look for and deal with other tasks that need attention, and later return to perform the unfinished series task.

Here are more tips to shield your proposal schedule from the Time Flies Demon and to prevent your schedule milestones from becoming millstones.

- ▶ Use a proposal schedule regardless of how much time you have to finish the proposal, be it two days, two weeks, or two months, or if it’s a solicited or unsolicited proposal.
- ▶ Develop boilerplate proposal schedules for turnaround times of 7, 14, 30, and 45 days, tailoring them later to meet the needs of the subject proposal. Begin a boilerplate schedule with the dates for pro-

posal start, proposal review(s), and the proposal delivery deadline. Then fill out the rest of the schedule with milestones reflecting the type of RFPs you typically respond to and the proposal development process you follow.

- ▶ Make the proposal kickoff meeting one of the first major milestones on the schedule. At that meeting, provide the proposal team with the proposal schedule, proposal outline and writing assignments, and a requirements matrix that cross-references RFP requirements to where they are to be addressed in proposal. Based on proposal team inputs at the meeting, revise the schedule and assignments as required. Ensure that the assigned proposal team members will be available to support the proposal and schedule.
- ▶ Have the schedule not only show the action item for a milestone but the individual responsible for the action. Don’t just assign a group to be responsible; specify someone in that group with the final responsibility. If everyone is responsible for something, no one is responsible—and the Time Flies Demon likes to be responsible for the lack of responsibility.
- ▶ Identify the critical and long-lead action items in your schedule. Build enough “wiggle room” into your schedule to respond to schedule slippage of these action items.
- ▶ Don’t shortchange the proposal review and revision (recovery) process. To get the most of your proposal reviews, schedule enough time for the review team to perform the proposal review and debrief and for the proposal team to revise the proposal based on the review. It can take up to about five days to review and debrief a major proposal and then recover from that review.
- ▶ Schedule your Fridays with an eye on productivity.
  - Avoid scheduling draft inputs for a Friday when nothing will be done with them until Monday. If drafts are turned in on Friday, do something with them over the weekend. For example, prepare the drafts for a Monday review or review them during the weekend.
  - Avoid scheduling the completion and debriefing of a proposal review on Friday if proposal recovery won’t begin until Monday. Schedule the review so the proposal team begins recovery while the

continued on next page

## Proposal Demons (Continued)

review results are still fresh in its mind. For example, conduct the review on Tuesday and Wednesday with the proposal recovery beginning on Thursday. By starting recovery the day after the review and during the same work week of the review, you may be able enlist reviewers to help with the recovery.

- ▶ Don't schedule proposal reviews too early or too late.
  - Reviewing a proposal draft with many missing or incomplete sections can be a waste of time. You can't review what you don't have. (However, the Proposal Exorcist recognizes that the value of a review isn't only the evaluation of what's in the proposal, but the identification of what isn't.) Reviewing a proposal draft close to the proposal delivery deadline may not allow enough time to revise the proposal and have it ready to beat that deadline.
  - Schedule a milestone such as a storyboard, annotated outline, or in-process review, between the initial writing assignment and the formal review of the first draft. Using a "sanity check" between the assignment and the formal review can provide early correction and guidance to writers so they can avoid making mistakes or omissions in their drafts that otherwise wouldn't be found until the first formal review.
- ▶ Take a firm, yet flexible, approach to your proposal schedule. Follow it as well as you can, but revise it when needed. As you update the schedule, annotate it with its date of currency. Distribute the most current schedule to each individual supporting the proposal.
- ▶ Give the production of your cost/price proposal the visibility it deserves. Schedule milestones for cost/price proposal development, an important effort that often lags behind the development of other parts of the proposal.
- ▶ Use a staggered (or rolling) schedule for reviews, edits, and printing to avoid schedule bottlenecks. For example, a staggered review could be productive in the following situations:
  - Some parts of the proposal are expected to be ready for review before others. (If only two volumes of a four-volume proposal are ready for review, why let the Time Flies Demon delay the review start until all four volumes are ready?)
  - All the reviewers won't be available to begin the review on the same day. (If proposal reviewers aren't available to review Volume 3 and 4 of a four-volume proposal, why let the Time Flies Demon delay review of Volume 1 and 2 until all reviewers are available?)
- ▶ Schedule enough time to choose the contracts you'll cite as a past performance in the proposal and for the contract references to process past performance questionnaires. Give your contract references at least a week and half to fill out and deliver the questionnaires to the customer. (For the Proposal Exorcist sermon about past performance and the Irrelevant Past Performance Demon, see <http://www.apmp.org/fv-863.aspx>.)
- ▶ Schedule a final edit only after all reviews and review recoveries are finished, and clearly define what kind of edit you'll do so you can schedule enough time for it. How much time you'll need depends on how much you have to edit and the scope of that edit. (Regarding scope: a grammar, spelling, and style edit can take a long time, while a basic edit for grammar and spelling likely won't.)
- ▶ If you're behind schedule and don't think you can submit an on-time, competitive proposal by the proposal delivery deadline, consider asking the customer for a deadline extension. (For the Proposal Exorcist sermon about the proposal extension and Extension Tension Demon, see <http://www.apmp.org/fv-974.aspx>.)
- ▶ If the RFP sets a desired, but not required, submittal deadline for any part of the proposal earlier than the final proposal deadline, deliver it early only if it's ready. It's better to provide a good section/volume by the final proposal deadline than to provide a not-so-good one by an earlier deadline that's optional.
- ▶ Do your best to comply with deadlines for sending questions to the customer about the RFP. However, don't be afraid to submit questions after the deadline if you really need the answers. Up until the proposal deadline, if you have a pressing question about the RFP, ask it. Let customers decide if they will or won't answer your questions. Schedule enough time for collecting, reviewing, editing, and sending your

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## Proposal Demons (Continued)

questions to meet the deadline. (For the Proposal Exorcist sermon about RFP questioning and the ? Demon, see <http://www.apmp.org/fv-987.aspx>.)

- ▶ Set a firm deadline for finishing the final draft to allow enough time for final production (final edit, layout, printing, document assembly, book check, and packaging). Know when to stop working on proposal content; there's a point when more polishing of the proposal isn't justified by the resulting gain of that work. Don't try to produce the perfect proposal because there's no such thing. Try to produce the best proposal you can with the resources and time you have. Here are other tips for the proposal development homestretch:
  - Don't procrastinate and let unfinished tasks pile up for action during the last week of proposal development. The Time Flies Demon tries to deceive you to believe that time expands at the end of the proposal process. It doesn't. One day in the last week has 24 hours, just like one day in the first week.
  - Plan a primary and back-up method for proposal delivery. If possible, schedule to have the proposal ready for shipment at least three days before the deadline. If it's not ready then, you'll have some "wiggle" room to get it ready.
  - Don't deliver the proposal too early. If you deliver well before proposal deadline, you may be doing it at the expense of productively using all the time you had for proposal development. Plus, you may be unpleasantly surprised by a customer amendment or proposal extension issued shortly before the original proposal deadline. If you've already sent your proposal when this happens, you could be forced to contact the customer to cancel the submitted proposal and then revise, produce, and deliver a new proposal.

(For the Proposal Exorcist sermon about proposal production and delivery and the Get-It-Out-The Door Demon, see <http://www.apmp.org/fv-845.aspx>.)

- ▶ Monitor the progress of your schedule in regularly held status meetings that reflect the needs and features of the proposal work and staff. A small proposal team, located at the same facility working on a two-week turnaround proposal, might hold daily sta-

tus meetings face-to-face. A large and geographically dispersed proposal team with a four-week turnaround proposal might hold weekly status meetings, face-to-face and/or by conference call, switching to daily status meetings during the last week and half before proposal submittal.

- ▶ As you progress through the schedule, keep the proposal team's eye on the proposal deadline by reporting the days left before proposal delivery.
- ▶ Evaluate the success (or lack thereof) of the proposal schedule as part of the proposal post-mortem, and apply those lessons learned in future proposal scheduling.

Although I don't know how much proposal development experience he had, there are two quotes attributed to Henry A. Kissinger (by [brainyquote.com](http://brainyquote.com)) that I think can be translated into a lesson about proposal schedules:

- "If you don't where you are going, every road will get you nowhere."
- "Next week there can't be any crisis. My schedule is already full."

The lesson? In your proposal travels, use a proposal schedule to prevent getting lost along the way and to avoid and respond to crisis. By heeding this lesson and the other advice in this sermon, the Proposal Exorcist hopes you can keep the Time Flies Demon off your proposal time clock and that all your proposals are delivered on time.



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