



# CAPTURE QUANTIFY COMMUNICATE

#### **Carrie Jordan**

Director of Proposals, Microsoft

#### **Amanda Heather**

Strategy & Operations Lead, Microsoft

## CAPTURE

How to identify and collect relevant metrics and indicators of proposal performance and value

## QUANTIFY

How to analyze and present the data in a clear and compelling way

## COMMUNICATE

How to tailor your communication strategy to different audiences and how to secure incremental funding and growth for your proposal organization

## CARRIE JORDAN

- > Wife and Mom of 5





## AMANDA HEATHER

- > Stress baker

- Strategy & Operations Lead at Microsoft

WHY ARE WE QUALIFIED TO PRESENT ON THIS?



## TOGETHER, WE:

Launched Microsoft's Proposal Center of Excellence (PCoE) as a pilot program in 2019



Secured incremental funding YoY, growing team by  $16x (4 \rightarrow 65)$  in two years





Developed SOPs, comms plan, rhythm of business, onboarding process, engagement criteria, intake process, tracking and reporting tools

Then streamlined and innovated over, and over, and over again

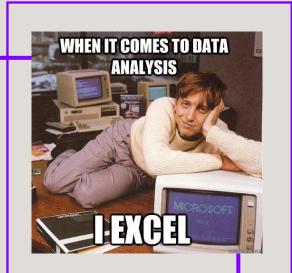


Increased our team's budget and staffing annually with incremental stakeholder investment across the company

## AND

We do all of this by capturing, quantifying, and communicating our team's impact





## **CAPTURE**

How to identify and collect relevant metrics and indicators of proposal performance and value

## INTAKE PROCESS AND MEDIUM



Microsoft Form



Platforms like Responsive, etc. have an intake feature



Custom PowerApp

CAPTURE

## DATA TO CAPTURE AT DEAL INTAKE:

- CRM tracking #
- Client Name
- Opportunity Name
- TCV / Value
- Proposal Due Date
- RFP Release Date
- Proposal Type (RFP, RFI, Proactive, etc.)
- Contract Duration

- Description of Opportunity
- Language
- Segment (Public Sector vs. Commercial)
- Industry
- Area / Geography
- Solution
- Is this a direct bid?
- Partner(s)

- Competitors' Positions
- Influence
  - No advance notice of RFx
  - Advance notice of RFx
  - Influenced RFx
- Account Executive
- Technical POC
- Additional Notes
- How you heard of us?
- Attach RFx documents

CAPTURE

O Preview

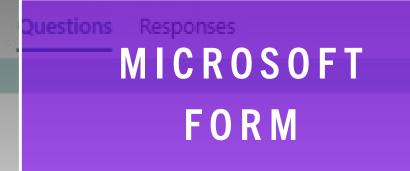
Style

Collect responses



Present

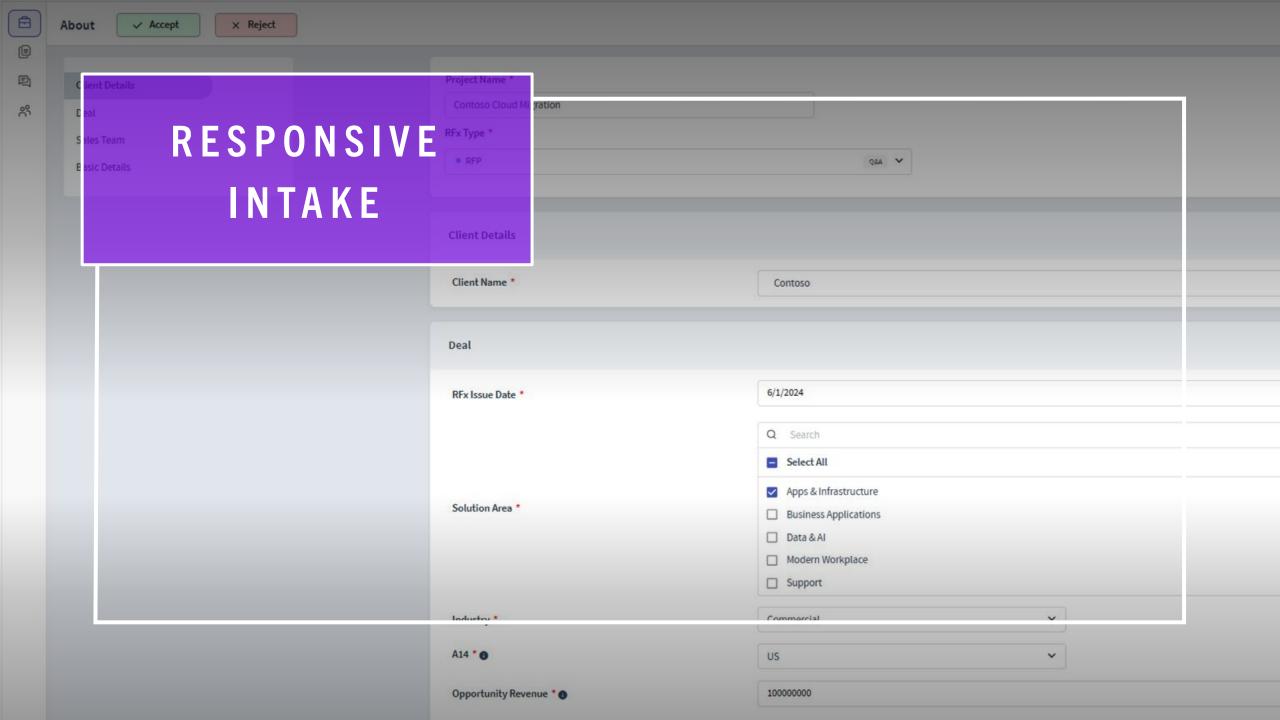


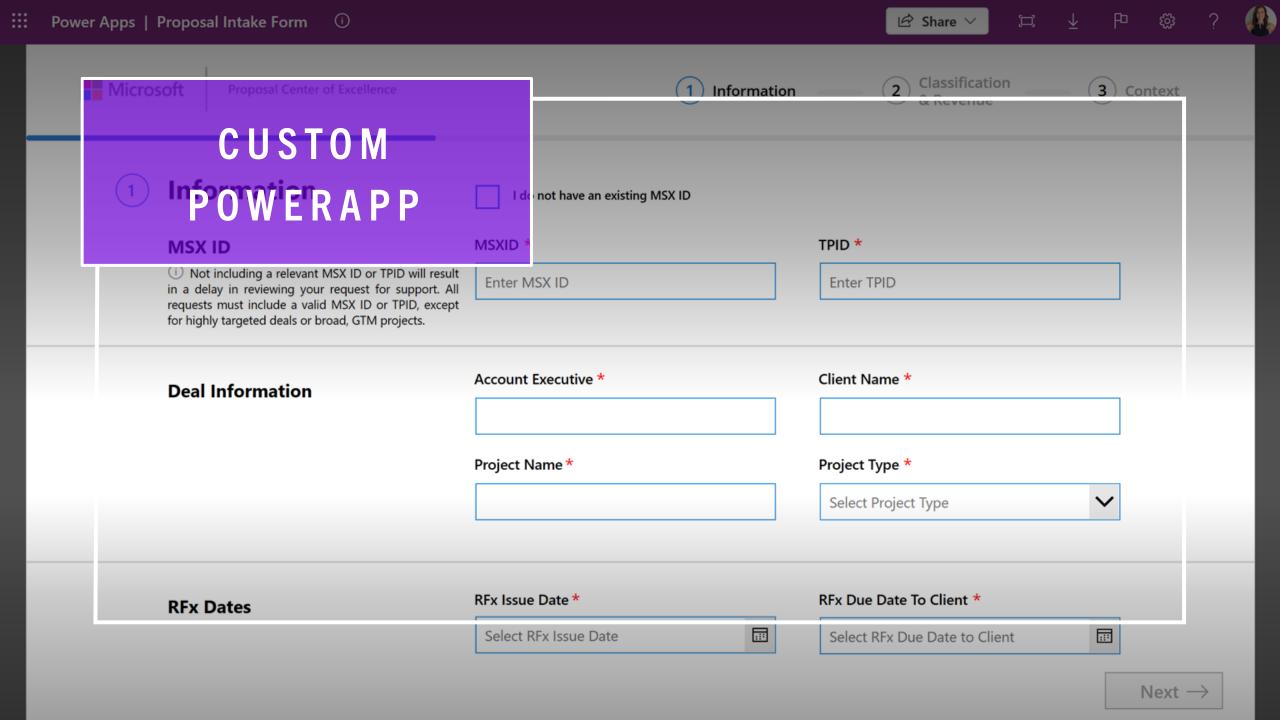


## Lets get started! What's your form about?

A good subtitle is like a trailer - it's a great chance to let your audience know what the form is about and get better responses.











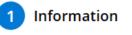
Revenue

## **Classification**

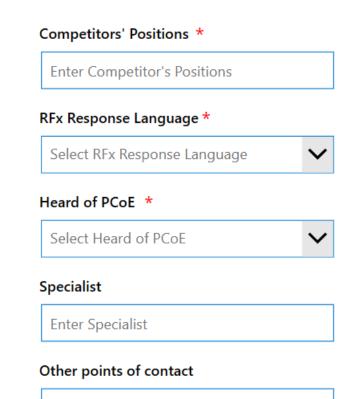
Solution Area *	Segment *	TCV/Microsoft Potential Revenue (USD) *				
Select Solution Area	Select Segment 🗸	\$ Microsoft Opportunity, Not customer budget				
Industry *	Area *	Number of Seats (if applicable)				
Select Industry	Select Area	Enter Number of Seats (if applicable)				
Is this a Direct Bid? *	Partner (primary) *	Contract Duration *				
Select an Option	Enter Partner	Select Contract Duration				
Is this Account S500?*	Is ISD (former MCS) involved? *	Is SPT involved? *				
Is this Account S500	Is ISD (former MCS) involved?	Is SPT involved?				
Is this an EU RRF Opportunity? *	MACC Opportunity *					
Is this EU RRF Opportunity?	MACC Opportunity					

Classification

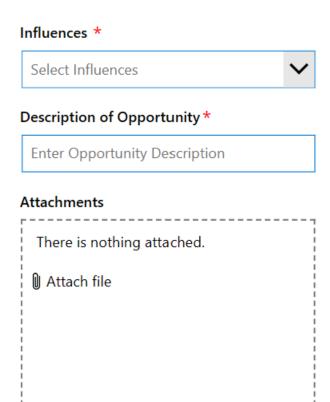
& Revenue



## **Context**



Enter Other points of contact





After submitting your request for support, you will receive a confirmation email. If you do not receive it, please try submitting your request again or contact us directly at:

PCoEIntake@microsoft.com

**Note:** If your deal has opportunityassociated documents (including RFx documents) and they're not uploaded here at intake submission, there will be a delay in our intake team assessing your support request.

## PLUS, ANY OTHER DATA STAKEHOLDERS CARE ABOUT

- Anchor tenant
- MACC
- S500 account
- EU RRF
- SPT involvement

None of these make sense to you, but the point is they matter to Microsoft stakeholders, so we capture them!

CAPTURE

## CONTENT MANAGEMENT DATA TO CAPTURE:

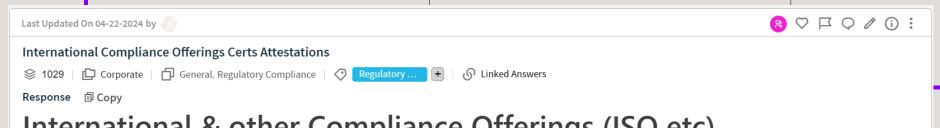
- Number of records
- Type of records (Q&A, Document, etc.)
- Usage per record
- Owners of content
- Review dates
- Graphics/text
- Product / solution

- Source of content
- Created date
- Segment (Public Sector vs. Commercial)
- Industry
- Area / Geography
- Project ID
- Last updated date

- Last reviewed date
- User Data
  - General region
  - Title
  - Content used
  - How did you find us?
- Search trends

Read More

- Total users/active users
- UI usage type (web, app, etc.)



International & other Compliance Offerings (ISO etc)

CAPTURE

## OTHER DATA TO CAPTURE

- Special projects
- Templates created
- Tools leveraged during RFP process
- # of graphics created
- # of questions answered
- # of pages written / edited
- Proposal team members assigned
- Time engaged (days/weeks or team hours)
- Closeout satisfaction survey results

If your team provides the service, capture the data.

## CAPTURE YOU

- Quantity of proposals supported
- Wins, losses, down-selects
- Deal sizes and deal durations
- Number of pages
- Number of graphics created
- Kudos and quotes about your performance





## **QUANTIFY**

How to analyze and present the data in a clear and compelling way



Your data = proposal proof points

Sell your service, value, and impact to your stakeholders

Combine data sets to tell the story each stakeholder cares about

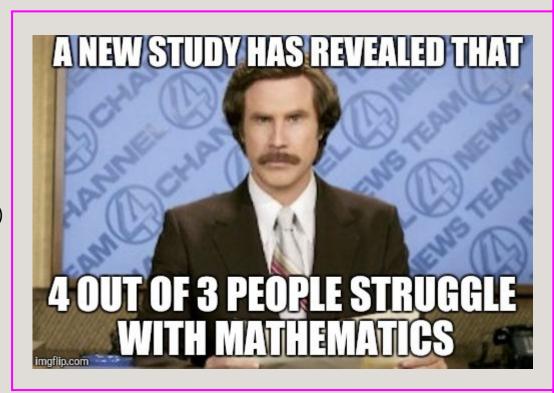
QUANTIFY

### METRICS

- Win rate
- Capture ratio
- Dollar and quantity supported
- Dollar and quantity won
- Field hours saved (Carrie's wonky formula)
- ROI

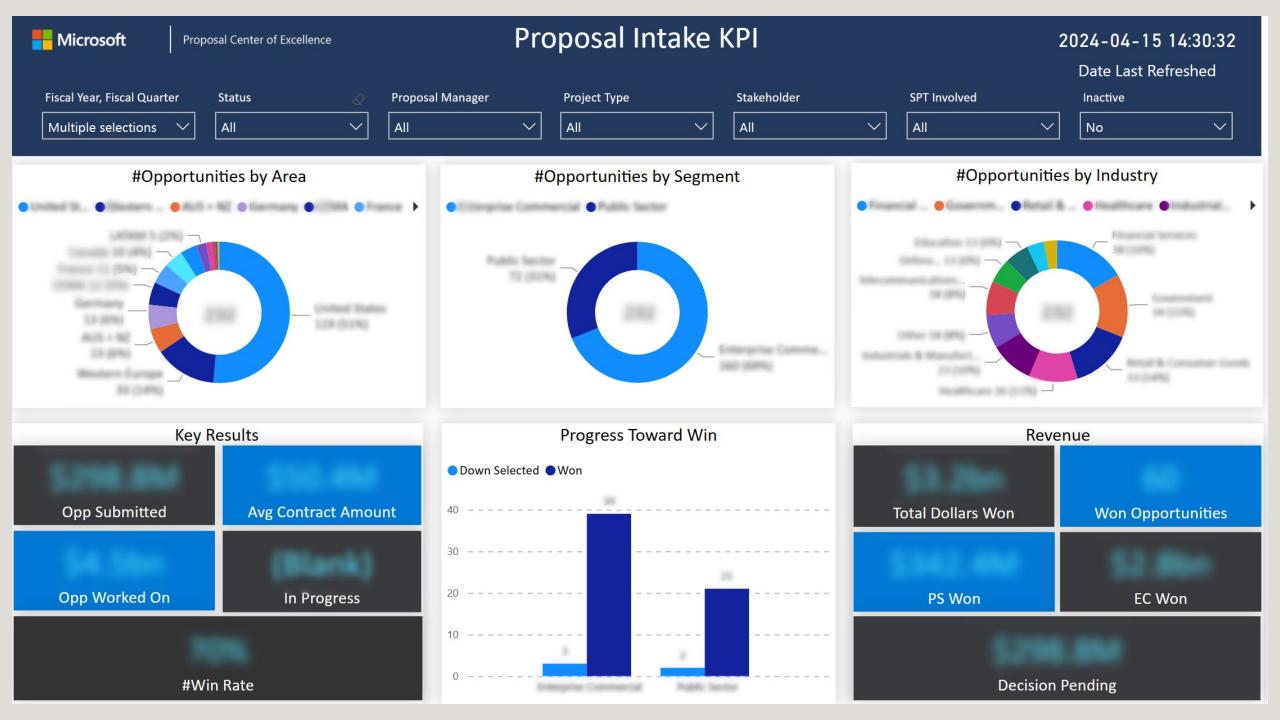
#### • MEDIUM

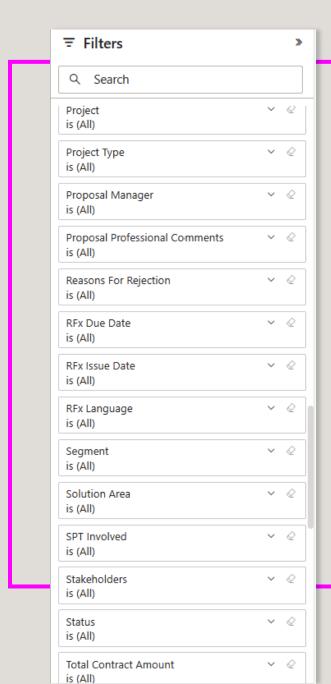
- PBI dashboards (per stakeholder)
- Excel to make graphics/charts

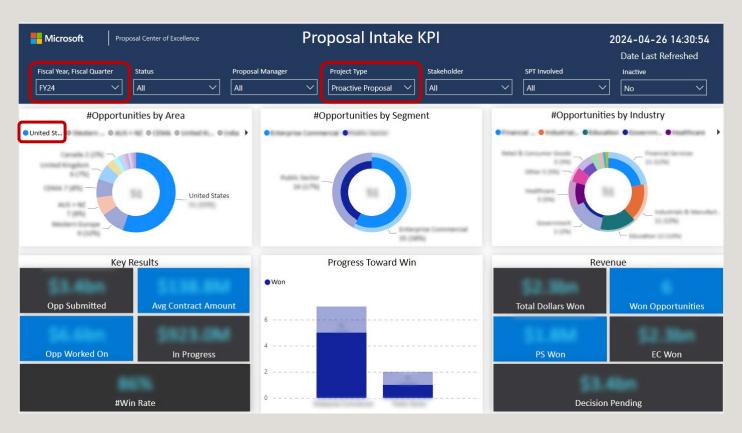


QUANTIFY

	А	В		с	D	Е	F	G	Н	1	J	K	L	M
1			FY21 Q3 Metrics											
2	Prop	osals submitted in FY21 Q3		Value	PS	EC	Global	Americas	EMEA	Asia	Won	Lost	Down-selected	Industry
7	4	REDACTED	Ś	20,000,000	1		1	1			1			Government
8	5	REDACTED	Ś	50,000,000		1	1	1						Energy
9	6	REDACTED	\$	120,000,000	1		1		1					Defense & Intelligence
10	7	REDACTED	\$	175,000,000		1	1	1						Retail
11	8	REDACTED	\$	6,000,000		1	1	1						Retail
12	9	REDACTED	\$	250,000,000		1	1	1				1	1	Media & Comms
13	10	REDACTED	\$	30,000,000		1	1	1						Financial Services
14	11	REDACTED	\$	108,400,000		1	1	1			1			Financial Services
15	12	REDACTED	\$	50,000,000		1	1	1						Financial Services
16	13	REDACTED	\$	45,000,000		1	1		1					Financial Services
17	14	REDACTED	\$	347,500,000		1	1	1			1			Healthcare
18	15	REDACTED	\$	110,000,000		1	1		1					Media & Comms
19	16	REDACTED	\$	500,000,000	1		1		1					Government
20	17	REDACTED	\$	40,000,000		1	1		1					Financial Services
21	18	REDACTED	\$	1,000,000,000	1		1		1					Government
22	19	REDACTED	\$	250,000,000		1	1		1					Energy
23	20	REDACTED	\$	183,000,000		1	1		1		1			Automotive
24	21	REDACTED	\$	8,000,000		1	1		1					Energy
25	22	REDACTED	\$	710,000,000		1	1		1					Automotive
26	23	REDACTED	\$	10,000,000		1	1		1		1			Media & Comms
27	24	REDACTED	\$	500,000,000	1		1			1				Defense & Intelligence
28	25	REDACTED	\$	4,000,000	1		1			1				Government
29	26	REDACTED	\$	60,000,000		1	1			1				Media & Comms
30	27	REDACTED	\$	115,000,000		1	1	1						Media & Comms
31	28	REDACTED	\$	200,000,000		1	1	1						Financial Services
32	29	REDACTED	\$	80,000,000		1	1	1						EC Other
33	30	REDACTED	\$	3,000,000		1	1	1						EC Other
34														
35			PCc	E Main Totals >	7	23	30	16	11	3	5	1		
36														
37														
38		TOTAL PCOE MAIN	s	5.195.900.000										







## QUANTIFY YOU

- Win rate
- Capture ratio
- Total number and value of deals supported
- NSAT and survey scores (if your proposal shop doesn't send out a survey after, send your own!)
- Create your highlight reel with kudos and quotes about your performance



#### About

As Director of Proposals for Microsoft's Proposal Center of Excellence (PCoE), Carrie Jordan is passionately creating the best proposal organization in the world...and to work for in the world. PCoE's mission for Microsoft is to increase deal quality so we show up in the best way possible for our customers and partners, to increase probability of win, and to save the Microsoft field time. While we pursue customer-centric proposal excellence, we also strive for a healthy, collaborative, and balanced environment for our proposal professionals.

Prior to her role as Director of Proposals for Microsoft's PCoE, she served as PCoE Strategy & Operations Lead, and earlier as Senior Proposal Manager. Carrie draws from over 16 years of experience in proposal management, coordination, writing, editing, content curation, and desktop publishing. The majority of her experience is in large, public sector cloud deals. She previously served as the Director of Consulting Services for Shipley Associates, the industry-leading authority on government and commercial proposal standards and processes. She's supported over \$150 billion in proposal wins.

Carrie was awarded APMP 40 Under 40 award in 2021. She has been featured in APMP's "Winning the Business" publication, the Baachu Scribble Talk podcast, and has spoken at both national and regional APMP conferences.

Ms. Jordan is also a successful small business owner in multiple non-competing industries.

## QUANTIFY CONTENT & OTHER SERVICES

## **Metrics**

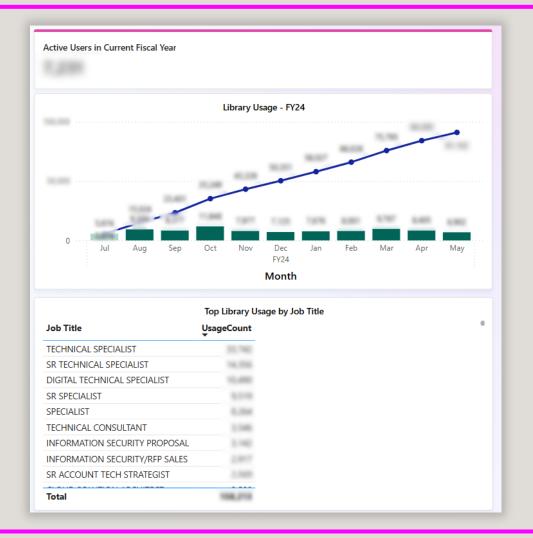
- Time/\$ saved
- Users reached with services
- Top roles accessing your content or services
- Trending content

## **Medium**

- PBI Dashboard
- Excel

Be creative in looking at the data you're already collecting and how that can be presented to show value / growth

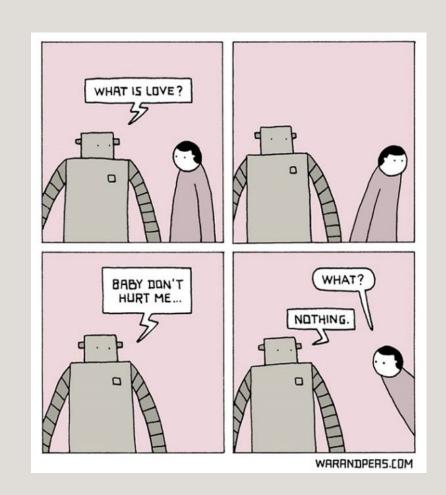
QUANTIFY



QUANTIFY

## **BONUS AI QUANTIFICATION:**

- % of proposals using Al
- Time to first draft
- # of total proposals supported
- Hours spent per proposal (decreased)





## COMMUNICATE

How to tailor your communication strategy and message to different audiences and levels of the organization. How to use this data to secure incremental funding and growth for your proposal organization.

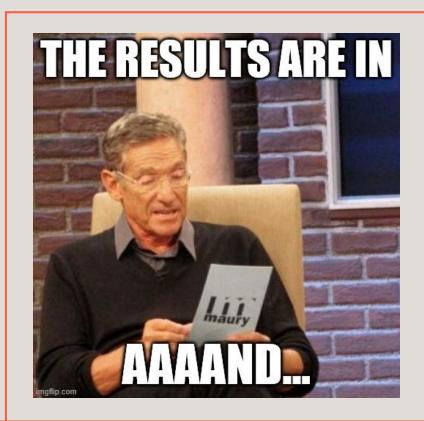
## AUDIENCE

- Director of Proposals
- Sales or Business Development Direct Leadership
- Sales and technical teams
- Other stakeholders
  - Incremental funding
  - Cross-organizational programs



## OUTCOME

- Amplification
  - Evangelization for use
  - Branding for reputation
  - Knowledge sharing
  - Recognition for team
- Directional Influence
  - Additional funding
  - Additional FTEs
  - Tools
  - Directional influence
- Personal impact (promotion, resume, networking)



## MEDIUM

- Email outlook email template .oft
- Outlook newsletter (new!)
- Staffbase, Constant Contact
- Teams Channel Announcements
- Viva Engage (or other internal social network)
- PPT
- Team Walking Deck
- LinkedIn



Boss: How good are you at Power

Point?

Me: I Excel at it

Boss: Was that a Microsoft Office

pun?

Me: Word

## COMMUNICATE BEST PRACTICES

- Short, snappy (bullets, not paragraphs)
- Memorable tag line
- Visually interesting
  - Accessible
  - Inclusive graphics
- Professional
- Call to Action



Proposal Center of Excellence



JULY 2022

### PCoE: Microsoft's Golden Goose FY22 Report



#### FY22 Additional Impact

- PCoE won > sim in MACCs
- Launched <u>Microsoft Deal Excellence Training</u> for field: 15 bite-sized modules to train the field to DIY proposals when needed
- BusApps Catalyst RFx team joined PCoE, deepening our capacity
- Launched 20+ new field enablement proposal and presentation templates

#### FY23 Plans: Even better if...

- Supporting our partners at scale: Strategizing firewalled access to curated partner content via Microsoft Proposal Resource Library
- <u>Expand industry specialization within PCoE</u>: Industry proposal SMEs and industry-tagged content in Proposal Resource Library
- <u>"Do more with less"</u>: PCoE moving to shared services model across all funding sources to optimize Microsoft's all-up investment in proposal services

#### Closing Remarks

FY22 was a year of massive growth and innovation for the Proposal Center of Excellence (PCoE). FY23 is the year of, "Even better if..." where we'll continue to scale support, refine processes, and ensure Microsoft is showing up in the best way possible for our customers and partners. A massive thank you to PCoE's stakeholders and various funding groups for enabling us to provide this impact. Without your support, this critical resource for the field would not exist.

In partnership,



#### Carrie Jordan

Director of Proposals

Proposal Center of Excellence



Please use the button below to submit a request for proposal support.





Proposal Center of Excellence

Deals in progress

(supported by

PCoE)



#### Feedback from the Field

Hours saved for the

Field

"Highly experienced team in project management as they coordinated inputs from various teams across the organization in a seamless way. It was also evident that the team has a deep understanding of our value proposition as they were able to re-use content from other workstreams they had worked which helped reduce duplication of efforts. The team also ran the project like clockwork, having a clear workback plan and making sure we all stuck to it which meant we managed to finish everything by Friday night with a few days to spare before submission."

Revenue Won (FY24

YTD)

#### CELA Specialist

"The sense of ownership, and sense of urgency, facilitating properly within our internal team as we all as bidding with us on this project. All that was really amazing."

#### SR Account Executive



#### **Projects in progress**

PCoE supported the account team with a complex and strategic response to a robotics RFP. The deal included Data and AI, Apps and Infra and ISD components. Submission of the RFP response took place in February 2024, and PCoE is still engaged supporting the account team with the development of the Orals presentation phase, which is due mid-April.

Due Date: April 2024

Value: TBD

Pipeline submitted

#### - Phase 2

In this second phase of the we are expecting to scale the system and expand to 50 plus nations and organizations based on the performance and trust of the platform over the next months.

PCoE is supporting the account team with producing a video in support of the expansion of the platform.

Due Date: May 2024

Value: M



#### **Highest \$ Projects submitted**

PCoE engaged to support this SPT-Led strategic deal for the establishing a Research & Development platform in We were heavily involved in the ideation, strategy, and development of a deck that was formulated as an initial Proactive Proposal for

PCoE Team's expertise and support were crucial in shaping this first phase of the proposal and ensuring that it effectively communicated the value of the platform to the customer.

Due Date: January 2024

Value: B

## FIELD SELF-SERVICE NEWSLETTER

#### **Proposal Resource Library News**

Content and resources to accelerate your next deal



April 20

In this issue:

What's New | Proposal Support | Don't Forget | In the Works

#### What's New



# The second control (1997) (199

## The state of the s

#### NEW! Streamlined UI in the Microsoft Proposal Resource Library

Responsive is spring cleaning!
Starting today - **April 10th** - the library features a new streamlined look!
Responsive, the software behind the library, calls the improvements the New Application Framework. The new UI declutters your experience by removing the left-pane navigation menu. You can now:

 Access the Content Library with the new "nine dot" application

#### What will you find in the library?



#### UPDATED! Redesigned login page

Notice something new at login?
Our recently launched library login
page allows us to better communicate
the content, purpose, and value of the
library. We're also providing a link to
the Microsoft Resources for Proposals
page. This one-stop source for library
training, support, and self-serve
proposal development resources is
your starting point for creating a
custom, compelling, and compliant
proposal response!

#### Don't Forget





Responsive (formerly RFPIO) Self-Serve FAQ

Watch this 5 min video which also covers the answers below: <a href="https://doi.org/WERO1">https://doi.org/WERO1</a>
1. I can't find the asswer i'm looking for – what do I do?

Microsoft's Progesal Resource Library governed by Responsive Gomenty REPICS is built from past; responses and Supplict Matter Expert contributions. If you can't find the content you need in either laters on the content of

Try searching in a different -

- the searth bar, error toywords from the question you are trying to answer.
   Use quotations to filter down results to exact keyword matches (like "previol report" instead searching for previol report.
- En ploy Socies a search terms to narrow your search results, such as AND, OR, and NOT. An example -Poset Plotforn NOT Placet 81.

  If you are arrowing a specific category, you can filter into the right Collection and also use Co.
  After and Tom to recovery years.
- Microsoft Learn (<u>streamenosostupe</u>) contains functional product information.

  The <u>Serior true trend</u> is the best place to find security-related reports and documentation.

2. The response I found works for the most part but doesn't completely apply to the quaswering.

You may not find an answer or document that perfectly responds to your question. Try looking at mu responses to get blass for writing a unique answer. Questions and answers are curated from proposal submitted to other dients.

ound an error in a response or outdated information – how do I get it fixed?

#### Don't Forget! Tutorials and resources to accelerate proposal development

Many of you may visit the library infrequently - like when an RFP lands in your lap or a customer asks a tough question. To help you quickly ramp up skills and find answers to your questions, we wanted to remind you of the resources you have at hand:

- Responsive General Channel for questions on using the library
- AskProposals@microsoft.com for library or proposal 'how to' questions
- Resources for Proposals page for all the self-service tools

Save these links to your browser Favorites!

#### Executive summary - Modernize service with Microsoft

For service leaders who want to offer unique, personalized service experiences at every outcome bouthpoint, service solutions with Microsoft Dysamics 365 help (<u>Contributed</u>) differentiate and build long-term outcomer loyalty, Unified competitions, these solutions enable semiles outcome experience, fairly service team productivity, and define massionaristic business outcomes with a unique combination of generative. A Journation and continuously continuously.

- Influed with generative All across the customer journey; for the first outsines resistantly management (DP to thing questible All operations into the solutions, Microsoft Demands 355 can leverage the power of Xarian Coervilla or guidely thing clarettimes. All powered innovations such as Copian into the entire Dynamics 360 portfolio.
- Fally connected end-to-end customer experience (privation 250 is a fully integrated, and extra privation from the end server except, man customers except to their server. Without rendring the eight on multiple vendors, so other a size of statement on an explation to almost the experience of their server of statement on extra statement or statement on extra statement of statement or experience of statement or experience of statement or experience of statement or experience or experience of statement requires integrate a survey, and to province statement or statement requires integrate and or experience of service end of statement requires.
- Cellaborate in context: Dynamics 865 uses the world-looking platform Microsoft Teams for maximizing agents and frontine productivity and contextual collaboration.
- Easily integrate other systems: Dynamics 265 can meet (Clerk Note) is outomes where
  they are to customes and integrate with their costing systems. With more than 1,000
  connectors, our counters interported with other 11 yestems to make our comprehensive
  offerings composable and adaptable, providing the on-ramps that customes need to get
  standed.

#### elling Customer Service or Field Service.

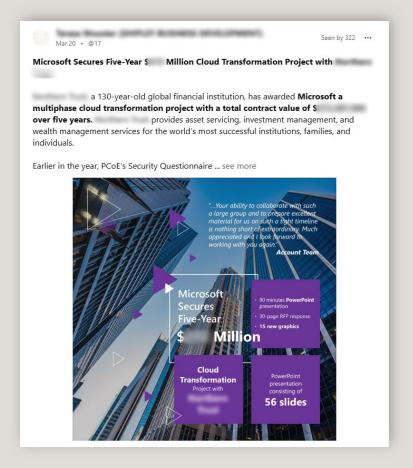
Great customer service is <u>absolubity official</u> to any organization's success. Today, organizations require modern solutions that can help them support customers on the channels and touchgoints of their choice, by provising customers with self-service options and aming customer support agents with access to information and experts to resolve issues quickly and

#### NEW! SAMPLE Executive Summary for the BizApps FY24 Solution Play -Modernize Service

Struggling to craft a compelling
Executive Summary for Modernizing
Service with Microsoft? We created a
Q&A resource to help you craft
executive summaries for D365
Customer Service and D365 Field
Service proposals! It contains guidance
for tailoring key messaging to fit the
unique needs of your customer plus
links to additional Executive Summary
resources. The text is aligned with the
Messaging & Positioning document
FY24 Solution Play - Modernize Service,
available on Seismic.

SAMPLE BizApps Modernize Service Executive Summary

## VIVA ENGAGE (YAMMER)





#### **NEW! Transformative AI and GenAI Proposal Resources**

The PCoE Proposal Resource Library now has five AI and GenAI case study documents and a companion presentation in the library! The files are ready to customize and send to customers. Download those relevant to your customer's scenario and customize using the guidance within the file.

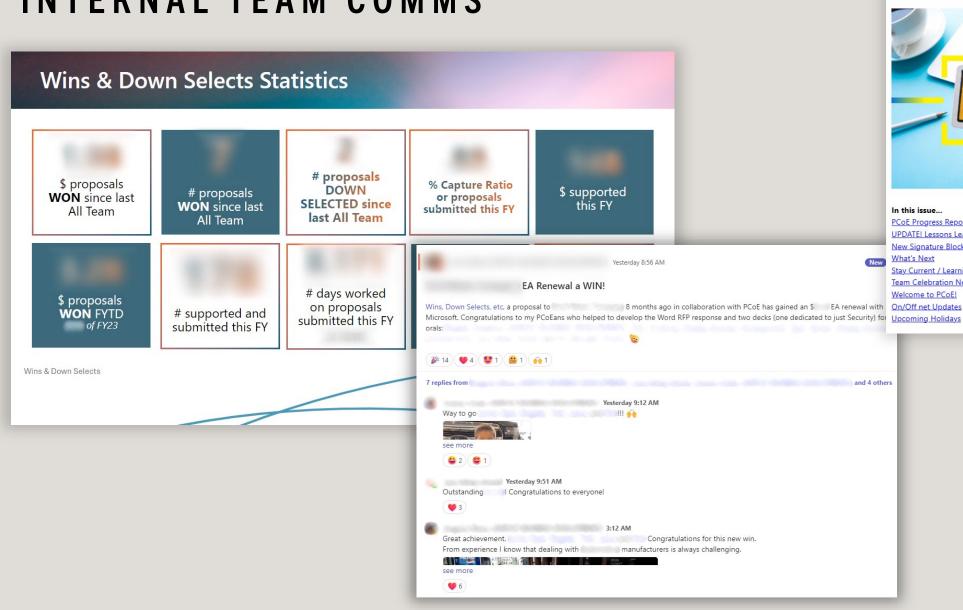
These sales assets are hot off the press and include:

- Microsoft Copilot
- GenAl-assisted pair programmer
- RPA GenAl Chatbot
- RPA GenAl Playground
- Al-assisted Text-to-order & Item Updates....

see more



## INTERNAL TEAM COMMS





#### In this issue...

PCoE Progress Report (FY23) UPDATE! Lessons Learned SOP

New Signature Block

What's Next

Stay Current / Learning Channel Summary

Team Celebration News

Welcome to PCoE!

## COMMUNICATE YOU

- Same formula
  - Audience
  - Outcome
  - Medium
- Impact over activity
  - Performance reviews
  - Resumes
  - Promotions
  - LinkedIn





## NAILED IT, NOW WHAT?

- Continual innovation
- New metrics to capture, combine data, and uplevel the quality of your comms
- As the industry changes, so does your capture, quantify, communicate strategy



## QUESTIONS??

Connect with us on LinkedIn!

Carrie Jordan

Amanda Heather

