



BPCC

NEW ORLEANS



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New Orleans, US



Lions, Tigers, and Bears OH MY! Internal Debriefs, External Debriefs, and After Action Reviews

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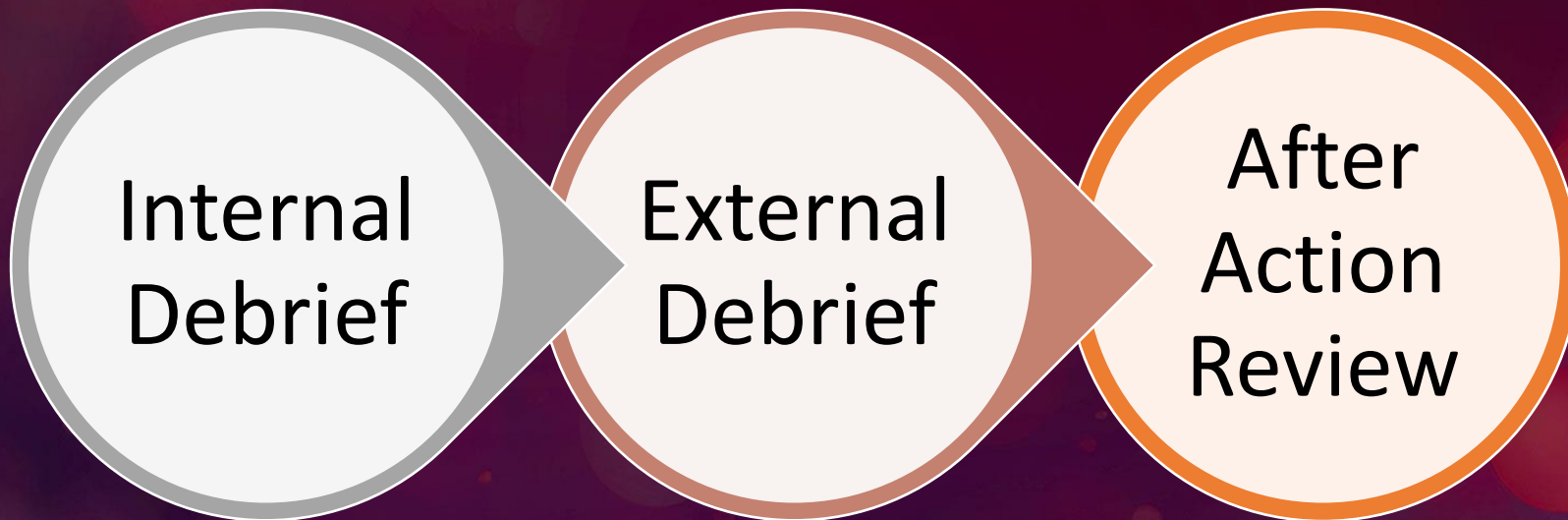
A classic illustration of the four main characters from 'The Wizard of Oz' walking along the Yellow Brick Road. From left to right: the Scarecrow in his straw-filled suit and pointed hat, the Tin Man in his metallic armor holding an axe, Dorothy in her blue dress and red shoes, and the Cowardly Lion in his shaggy brown fur. They are walking towards the right, with a lush green landscape and a dramatic, cloudy sky in the background.

**So, you want to create a consistent
post-proposal submission process?**

You'll
need
brains



What's the difference?



External Debriefs – Federal (Preaward Debriefing Request)

FAR Clauses [15.505 & 15.506]

- Request 3 days after receipt of notice of exclusion from competition
- At offeror's request, debriefing can be delayed until after award

External Debriefs – Federal (Postaward Debriefing Request)

FAR Clauses [15.505 & 15.506]

- Request 3 days after receipt of notice of contract award
- Debriefing for both successful AND unsuccessful offerors
- Occurs within 5 days of written request
- Contracting officer normally chairs the debriefing session

External Debriefs – Federal Debriefs: What Do We Learn?

FAR Clauses [15.505 & 15.506]

- Significant weaknesses or deficiencies
- Overall evaluated cost or price, technical rating, and past performance information
- Overall ranking of ALL offerors
- Summary of rationale for award
- Make and model of product to be delivered by successful offeror
- Responses to relevant questions

External Debriefs – State & Local

Freedom of Information Act (FOIA)

- BEFORE requesting, search publicly available information on FOIA.gov
- If not available, submit a FOIA request to the agency's FOIA office
- There is no specific form that must be used to make a request
- Engage Legal
- <https://www.foia.gov/how-to.html>

You'll
need
heart



- Goal of any post Proposal submission activity(ies) is always on PROCESS IMPROVEMENT never laying blame, scapegoating, or complaining.
- PROCESS IMPROVEMENT can be either focused on individual contribution or team/company.

You'll
need
courage





“Put ‘em
up, put
‘em up!”

Your Organization's Who, What, Where, and When for Your Lions, Tigers, and Bears

LEARNING ACTIVITY

	Your Organization's Process			
	When Does It Happen?	Who Owns This and What Is the Proposal Manager's Role?	What Is the Purpose?	Where Does It Take Place?
Internal Debrief				
External Debrief *Always requested*				
After Action Review (Win Analysis, Loss Review, etc.)				



Your Organization's Who, What, Where, and When for Your Lions, Tigers, and Bears

LEARNING ACTIVITY

	Your Organization's Process			
	When Does It Happen?	Who Owns This and What Is the Proposal Manager's Role?	What Is the Purpose?	Where Does It Take Place?
Internal Debrief	Typically, very quickly after proposal submission	Account Executive (AE) or Sales Manager Proposal Manager acts in an advisory capacity	To discuss objective observations and operative suggestions for improvement	Virtual/phone or in person
External Debrief *Always requested*	Within 3 days of contract award (or source selection notice)	AE or Sales Manager Possibly engage Legal Proposal Manager provides input or focus for debrief questions	To obtain as much information about our evaluation and that of our competitors to inform future procurement opportunities	Virtual/phone, email, or in person
After Action Review (Win Analysis, Loss Review, etc.)	Once analysis has been completed from the external debrief	AE or Sales Manager Proposal Manager acts in advisory capacity	To bring everyone together once the external debrief has been completed and determine what feedback to implement	Virtual/phone or in person



Sample Internal Debrief Participation Request Email

Hi All,

In order to have a successful debrief call, we need your participation. Please plan to either join us in conference room XXX or dial in via the conference line above. I have provided an agenda below that will help organize our thoughts and guide our discussion. Keep in mind our goal for this meeting is to identify key takeaways and changes that we can make when responding to future XXX opportunities.

Team, if you know of others who should be included in this debrief based on the agenda topics, please let me know and I will be happy to forward an invite onto them.

Thank you,
Proposal Manager



Internal Debriefing Example Agenda

LEARNING ACTIVITY

Internal Debriefing Example Agenda

- Schedule Management/Communication
 - What happened?
 - Why did it happen?
 - How can I improve the process in the future?
- Reviews
 - What happened?
 - Why did it happen?
 - How can I improve the process in the future?
- Teaming, specifically when we need a Teaming Agreement/NDA
 - Past Performance
 - Writing/Content
 - Pricing



External Debriefs – Federal Example

Email Template

Good afternoon **CUSTOMER CONTACT NAME**,

I hope you're doing well! We wanted to thank you for all your assistance throughout the response process for **PROCUREMENT TITLE AND NUMBER**.

As we received **NOTICE OF EXCLUSION FROM COMPETITION/NOTICE OF AWARD** on **XYZ DATE**, we formally request a **PREAWARD/POSTWARD** debrief, in accordance with FAR 15.505 & FAR 15.506.

We look forward to receiving feedback on our proposal and learn how we may be able to more effectively meet the needs of the **CUSTOMER NAME** with a future opportunity down the road.

Again, we really appreciate all your assistance, and your quick responses throughout this whole procurement process. It's been a pleasure working with you.

Best,
AE NAME



External Debriefs – State and Local Email Example

Email Template

Good afternoon **CUSTOMER CONTACT NAME**,

I hope you're doing well! We wanted to thank you for all your assistance throughout the response process for **PROCUREMENT TITLE AND NUMBER**.

Now that the procurement process has concluded, we would like to request all the proposals that were submitted, along with the evaluation rubrics and winning contract. Is that something we are able to request directly of you, or would you prefer we follow a more formal FOIA process? Just let us know what **CUSTOMER NAME** prefers.

Lastly, would **CUSTOMER NAME** consider a debrief or post-award interview? We would love to get feedback on our proposal and learn how we may be able to more effectively meet the needs of the **CUSTOMER NAME** with a future opportunity down the road.

Again, we really appreciate all your assistance, and your quick responses throughout this whole procurement process. It's been a pleasure working with you.

Best,
AE NAME



External Debriefs – Commercial Email Example

Email Template

Good afternoon **CUSTOMER CONTACT NAME**,

I hope you're doing well! We wanted to thank you for all your assistance throughout the response process for **PROCUREMENT TITLE AND NUMBER**.

Now that the procurement process has concluded, would **CUSTOMER NAME** consider a post-award debrief meeting or interview? We would love to get feedback on our proposal and learn how we may be able to more effectively meet the needs of the **CUSTOMER NAME** with a future opportunity down the road.

Again, we really appreciate all your assistance, and your quick responses throughout this whole procurement process. It's been a pleasure working with you.

Best,
AE NAME



External Debrief Call with Customer

LEARNING ACTIVITY

External Debrief Call with Customer

LEARNING ACTIVITY

- What did they find most compelling about your offering?
- Where did they see the biggest risks?
- What made the successful bidder's offering more attractive?
- What was the winning price?
- Are there follow on projects for which we might be well-suited?



After Action Review Email

Hi All/Team,

In order to have a successful After Action Review, we need your participation. On the SharePoint link below in the **FOIA Documents folder**, please find our competitor responses as well as score sheets for both **our Organization and our competitors**:

SP SITE LINK/FOLDER

I will update this meeting invite with an agenda to facilitate discussion, but please keep notes as you review the FOIA documents. Keep in mind our goal for this meeting is to identify key takeaways and changes that we can make when responding to future **XXX and similar** opportunities.

Thank you,
Emily



After Action Review Email Agenda

LEARNING ACTIVITY



Purpose of Meeting:

To discuss feedback received from XXX that we hope can benefit SAS when responding to future opportunities.

Agenda:

We will discuss the feedback and deductions we received in the following areas and identify how we can focus on process improvements and avoid deductions like these in the future, if possible:



After Action Review Email Agenda



LEARNING ACTIVITY

Purpose of Meeting:

To discuss feedback received from XXX that we hope can benefit SAS when responding to future opportunities.

Agenda:

We will discuss the feedback and deductions we received in the following areas and identify how we can focus on process improvements and avoid deductions like these in the future, if possible:

- Proposed Solution
- Security Requirement
- Legal Compliance
- Project Personnel
- Past Performance

You'll
need
hope





Which Opportunities?

Large LOE or
Strategic
Opportunities

External Debrief
is a Priority

Eventually
conducting all 3
is a Best
Practice!

What Now? Closed Loop Process for Proposal Managers

LEARNING ACTIVITY

A classic scene from the 1939 film 'The Wizard of Oz'. Dorothy, the Tin Man, the Cowardly Lion, and the Scarecrow are walking along the Yellow Brick Road. The Scarecrow is on the left, followed by the Tin Man, then Dorothy, and finally the Cowardly Lion on the right. They are all smiling and looking towards the camera. The background features a lush green landscape with yellow flowers and a dramatic, colorful sky with purple and orange hues. The word 'TAKEAWAYS' is written in large, white, bold letters across the center of the image.

TAKEAWAYS

**Please send us your feedback! Access the survey
through the QR Code below:**

