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Turning Around a Losing Proposal

A Case Study of Great Expectations

This is a true story

"Just the facts..."

- This company was pursuing a multi-billion-dollar program

- Winning the program was a unique opportunity to disrupt the status quo that had existed in the industry for over twenty years

- Their offer was clearly differentiated from the competitors—not a me too—with compelling advantages to the customer's mission

- Winning would mean full-employment for the coming decade

- There were few hurdles to success other than executing on the strategy and developing a winning proposal

- All had Great Expectations of winning

But as you will soon discover...

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"It's a great cake. A bride-cake. Mine!" She looked all round the room in a glaring manner, and then said, leaning on me while her hand twitched my shoulder, "Come, come, come!"

Great Expectations

We've all been there...

As the capture manager,

you are the executive responsible for winning

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It's noon and...

...at 8am tomorrow, about 20 senior members of your management team and outside experts are arriving to review the proposal as the first end-to-end review.

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You take stock of things

Of three major volumes:

- one is 200 pages, but the allowed page count is only a 100,

- another is woefully short of the allowed number of pages, and

- the third hasn't even started in earnest

The narrative is mostly text, but you know

- is full of grammatical mistakes,

- is incoherent at times, and

- isn't telling a story that sells the "why us"

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You realize that

You have a collection of technical reports,

Not a proposal!

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You ask yourself how did you get here

Did you start early enough?

✓ You started a month before the RFP was issued

Did you follow a process?

✓ You tried to follow your company's "96 step" process that was developed by the consulting firm who "wrote the book"

Did you have a schedule?

✓ The schedule was the first thing you prepared and everyone agreed with it

Did you have help?

✓ You hired the same consulting firm (not SMA) that helped you develop your company's process to manage the effort

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Regret

You are now wondering how the consulting firm you hired

let you down…

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But (here come the excuses)…

The proposal manager is telling you that

1. There weren't enough subject matter experts and authors so most of the contribution is from only a handful of people, including yourself

2. We weren't given a clear and detailed briefing on the competitors, the customer and our win strategy

3. I couldn't get senior management's attention for the early key steps in the process or to participate in meetings

4. We still have 60 days before we have to submit, so it is going to be OK

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Your mindset

You and your hired consultants are going to get this done

- even if we are going to have to make up for shortfalls every step of the way

- We are heroes

(there is nothing wrong with you, it is natural to think this way)

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So you thank your lucky stars

You are 30 days into a 90-day response timeline—for this, you are extremely grateful

However, you still have to:

1. Edit away 100 pages in one volume

2. Complete the 2nd volume

3. Get going on a third volume

4. Worry about graphics

5. Prepare many design reports that are due with the proposal

6. Complete the cost volume even though you don't have a pricing strategy

7. Leave enough time for final review, edits, production, assembly and shipping

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... and shore yourself up

- It's too late to halt the review tomorrow.

- You will expect it to be days, will take the hard knocks.

- But you, the consultants and a few others will persevere to the end by continuing to grind away.

- After all, you still have 60 days, and your proposal manager is an expert at prosecuting the 96-step process.

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By the way…

- SMA had lost to a rival firm to help this client develop the proposal, but…

- We were hired to do the review.

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"And the mists had all solemnly risen now, and the world lay spread before me."

Great Expectations

The review

- As fated, it was awful even though the reviewers put the best face on it to not discourage the team.

- The reviewers found it was necessary to first focus their attention on the win strategy and how it should be reflected in each volume.

- We concluded that continuing to do more of the same will not result in a winning proposal.

- A game-changing opportunity that was in their grasp will be lost.

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Status quo is not an option

The review team captain requested a meeting with the CEO and Capture Lead to discuss

- the true status of the effort

- decisions that needed to be made and actions undertaken to execute on the win strategy

- a plan to turn the proposal around

- SMA was hired to help turn it around

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The mists had risen

- Within 48 hours, an SMA team arrived at the client site to help with developing the baseline program plan and schedule, refine the win strategy and themes, and turn around the proposal effort

- The CEO and COO of SMA, and other members of its executive team with extensive experience in similar competitions became integral to the client's activities

- The team engaged in deliberate ways to engender camaraderie and create a productive, collaborative work environment with the client, including persons from the rival consulting firm

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Understanding is the first step

to acceptance, and only with acceptance can there be recovery.'[1]

We were in this situation because (without excuses)

- **Strategy:** became a thing of the past as details of the day-to-day consumed everyone

- **Process:** wasn't enforced and not rooted by "Proposals are developed, not just written"

- **Priorities:** behaviors did not reflect what was at stake

- **Leadership:** the team including the hired consultants didn't understand their remit and license

Your profession is more than the application of best practices in a process

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The most important take away

It's also about your contribution that comes from your understanding of the strategy and how you execute that strategy in the proposal:

Requires you to understand the process from a behavioral perspective, not just mechanical

- so you can use the process to enable everyone to contribute

- and empower everyone to lead in their own roles,

- so not only do you "do things right" but you also "do the right things" as a team.

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Turn-around: build a new foundation

1. Understand what you have, what you don't have, and how you will use what you have (avoid the temptation to edit your way to a proposal)

2. Restart the schedule from Day 1 — no matter how little time you have left, its always better to submit a proposal that clearly articulates your differentiated value proposition than having to hunt for it in regurgitated miscellany

3. Accelerate every step in your plan to create slack by eliminating the unnecessary and reducing task dependencies (e.g., complex graphics when you can adequately use narrative)

4. Involve senior management as participants of the turn-around, not just as interested observers

5. Status the proposal by volume and section at least each day — focus on the trends in maturity, quality and schedule

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Turn-around: smart strategic execution

6. Make sure you have enough resources prioritized on compliance (before you can win, you first have to not lose)

7. Reduce the strategy into an articulated form, map the win themes into each major section, and write a strawman introduction for each major section for the authors

8. Establish the burden of proof for each evaluation factor

9. Simplify the process to its core: plan the section, design each page, plan what you are going to write on that page, identify what you are going to write, and only then, finally write

10. Hold frequent story conferences with authors and "equity leads" to incrementally improve quality and drive buy-in, section by section during each step of the simplified process

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Turn-around: do things differently

11. Don't let the process fool you into thinking you are creating a winning proposal

12. Identify behaviors that are going to cause you to lose, and no longer tolerate them

13. You have the responsibility to professionally engage senior management — everyone's interests are aligned to winning

14. Develop a team that can win — commitment, training and expectations

15. Accept that winning is not accomplished by a handful of heroes

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Great Expectations

The team fulfilled their expectations by winning this $B program by a wide margin:

"Thank you for kind note and putting our win in perspective. We couldn't have done it without the support of SMA and your personal involvement."

Client Capture Lead

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SMA's Value Proposition

Unique collaborative engagement

- Our approach with our clients enables more courageous and committed choices

Shared responsibility for project outcomes

- Extensive management team actively engaged on every project from strategy to implementation delivering value beyond the experience and expertise that each individual brings to your project

Focus on engaging where we can have an impact

- Whether to significantly improve a client's ability to win new business or create a franchise, or to meaningfully enhance a client's capability to manage program execution and risk

Operational strength and quality delivery

- We address our clients' needs informed by perspectives and insights gained from over 40 years of corporate experience across the entire program lifecycle—we guarantee client service quality

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