



Turning RFPs Into Winning Proposals

Speaker: Harold C. Gillens, PSP, CFC, CHS-III

Agenda

- Pre-Proposal Marketing (Discussion)
 - *Sole Source Possibilities*
 - *Evaluation Criteria Influencing*
 - *Client FUD Injection*
- The Proposal Phases
 - *Pre-Proposal Decision Making*
 - *Proposal Preparation*
 - *Proposal Submission*
 - *Post Proposal Discoveries*

How do you avoid writing a Proposal?
OR
How do you become the leading candidate for Award?

- **Pre-Proposal Marketing (Discussion)**
 - *Have you established yourself and/or company an industry leader (the “go to guy”)*
 - *Have you asked for and reviewed the clients’ Contracting Forecast for this year?*
 - *Can the Client perform a Sole Source or Direct Contract Award?*
 1. *Government or non-Government (City, State, or Feds)*
 2. *B2B Contracting*
 - *How can you influence the clients’ Evaluation Criteria in your favor?*
 1. *Is the client open to discussion or a white paper?*
 2. *Is the client conducting a Market Research or **Sources Sought?***
 3. *Within one or the above, have you added any certification, specific past performance of anything that points back to you?*
 - *Is there a way to inject Fear, Uncertainty, and Doubt (FUD) in the Client ?*
 1. *While injecting FUD, have you also ensured the client that “you” can provide a CLEAR solution?*
 2. *Have you also assured them of their role in the solution and how valuable they are in getting it done right.*

80% Success Rate

Preparing Successful Proposals

Proposal Phases

- 1) Pre-Proposal
- 2) Proposal Preparation
- 3) Proposal Submittal
- 4) Post -Proposal

50% Success Rate

Pre-Proposal


Step 1

- **READ** the proposal **thoroughly** to decide if you will bid using the following decision points;
 1. Is this project within your Core Business?
 2. Do you have the necessary resources to cover the life-cycle of the project?
 3. If outside consultants are needed, are they readily available and reliable?
 4. If Reps and Certs are required, can you meet all applicable requirements?
 5. Is there enough **time** to prepare and submit a **quality proposal**?

Step 2

- If Step 1 produced a green light, perform the following tasks;
 1. Prepare a **Requirements Matrix** (*Appendix A*)
 2. Prepare a **Submittal Checklist**
 3. Digest the Evaluation Criteria
 4. Begin assembling resumes of Key Personnel / Consultants, if required
 5. Develop a **Proposal Work Plan**
 - a) Who will work what sections
 - b) Develop a Proposal Schedule

Proposal Development

1. Begin writing sections mapping them to the Requirements Matrix.
 2. Develop an Executive Summary that
 - a) Gives a summation of the company's capabilities
 - b) Shows how your capabilities are suited to the project requirements
 - c) Shows your knowledge and understanding of the requirements
 - d) Includes an Organizational or Project Staffing Chart
 3. Assemble applicable Past Performances
 - a) Use a well formatted table for each past performance (*Appendix B*)
 - b) Give preference to those past performances that best match the requirements
 4. Develop a Project Schedule using Microsoft Project or insert a table with tasks and dates
 5. Assemble a completed Proposal and send it through a **planned review process**.
 - a) Edit only one Master Document
 - b) Have "Track Changes" turned on.
 - c) Schedule a *group review and editing session using a projector*
- 

Proposal Submittal

1. Print the final proposal and the number of prescribe copies
2. Use economical, but attractive binders (*Check RFP for directions*)
3. Review all submittals against the **Submittal Checklist**
4. Burn CDs with the proposal and apply a professional label
5. Deliver the Proposal per the RFP
 - a) Try to deliver at least 3 days before the submittal date (*Name Recognition*)
 - b) Use two means of delivery to advert Murphy's law!! (*FEDEX & DHL or UPS*)

Post Proposal

1. YOU WON (CELEBRATE) THEN -- ASK WHAT MADE THE DIFFERENCE?
2. YOU LOST (CONTEMPLATE)
 - a) Ask for a de-brief – Ask what made the difference?
 - b) Congratulate the winner and **offer your services**
 - c) **Document lessons learned** for the next proposal exercise.

Appendix A – SAMPLE Requirements Matrix

SECTION	DESCRIPTION	PAGE
A	Executive Summary / Profile, Experience and Qualifications	
	Quintech's interpretation of key proposal features. Company's qualifications and success in providing the goods and services outlined in this RFP; And experience with institutions of higher education, and other clients with comparable requirements to the University.	
B	Engagement Team and Engagement Management	
	Qualifications of each key member, project organization and team member's role.	
C	Technical Approach / Work Plan	
	Quintech's approach to satisfying the requirements as outlined in the Scope of Work;	
D	Cost Proposal	
	Quintech's cost proposal including but not limited to discounts, service charges and other charges;	
E	Ongoing Consultation --Pricing Approach	
	Quintech's proposed cost approach for supporting the University on an on-going basis;	
F	Capacity and Willingness to Satisfy the University	
	Quintech's capacity and willingness to satisfy the University;	
G	Certificate of Insurance	
	The company's certificate of insurance in accordance with the University's contract requirements;	
H	Financial Strength	
	Quintech's demonstrated financial strength within the security industry.	

Solicitation Cross Reference Matrix

PWS	Work Description	Section L	Section M	CDRL	Proposal
1.1	The base year of these services shall be implemented during a transitional time for DISA and relocates to its new building on Fort Meade, Maryland	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1
1.1	The Security Division shall work closely with the Contractor as relocation plans are published to phase-in positions as needed	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1
1.1.1	The purpose of this effort is to obtain high quality security service in support of the Defense Information Systems Agency (DISA) that shall provide best-in-class security operations and services to its customers	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1
1.1.1	These services shall be implemented during a transitional time for DISA as the Agency vacates its National Capital Region (NCR) security elements and relocates to its new 1.1 million square feet campus on Fort Meade, Maryland	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1
1.2	shall provide all personnel, equipment, tools, materials, supervision, and other items and non-personal services necessary to perform security guard responsibilities	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1
1.2	Shall provide Communication Security (COMSEC) duties	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1.1
1.2	Shall provide Information Systems Security Manager (ISSM) duties	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1.1
1.2	Shall provide Physical Security Specialist duties	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1.1
1.2	Shall provide Counterintelligence (CI) Support duties	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1.1
1.2	Shall provide Electronic System Security Administrator duties	4.2, 4.2.1.1 4.2.2	2.0		Vol II, 1.1
1.2	The Contractor shall be responsible to maintain required security guard licensing	4.2, 4.2.1.1	2.0		Vol II, 1.1

Appendix B – SAMPLE Past Performance Table

Contract/Task Order Title and Number: HDEC04-06-C-0005 / Title: - DeCA – Defense Commissary Agency	Contract/Task Order Period of Performance: 10/06–06/08		
Contract/Task Order Value: \$1,059,244.00	Contract/Task Order Type: FFP		
Customer Contacts: <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> Contracting Officer <i>Name:</i> Ronnie Nelson <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8643 <i>Email Address:</i> ronnie.nelson@deca.mil </td> <td style="width: 50%; vertical-align: top;"> COTR <i>Name:</i> Steve Brunow <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8165 <i>Email Address:</i> steve.brunow@deca.mil </td> </tr> </table>		Contracting Officer <i>Name:</i> Ronnie Nelson <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8643 <i>Email Address:</i> ronnie.nelson@deca.mil	COTR <i>Name:</i> Steve Brunow <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8165 <i>Email Address:</i> steve.brunow@deca.mil
Contracting Officer <i>Name:</i> Ronnie Nelson <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8643 <i>Email Address:</i> ronnie.nelson@deca.mil	COTR <i>Name:</i> Steve Brunow <i>Address:</i> Defense Commissary Agency <i>Telephone Number:</i> (804) 734-8165 <i>Email Address:</i> steve.brunow@deca.mil		

DECA HQ – CCTV, PUBLIC ADDRESS (PA) AND MUSIC SYSTEMS SITE INSPECTION / ASSESSMENT

Description: The Equipment Maintenance & Replacement Branch, Logistics Division requested a comprehensive assessment at select Defense Commissaries in the United States, its territories, Okinawa, Japan and South Korea. DeCA required the support of a security consulting firm to conduct a comprehensive, unbiased assessment at 11 regional areas, subdivided into 27 zones with 192 commissaries.

