

# Proposal Writing Benchmark Study

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## Proposal Steps

### ***SOW Description*** (from BAE RFP)

Physical steps used to develop a proposal:

- Storyboarding
- Theme development
- Timing of kicking-off proposal teams with respect to baseline development
- Incorporation of price-to-win/cost-to-win
- Management reviews (timing, frequency, depth/level)
- Gates used to control proposal development
- Use of proposal templates, boilerplate sections, compliance matrices, etc.

### ***Background*** (Issues, other considerations)

- Not as concerned with relative strengths or weaknesses of industry writing methods – e.g., Shipley vs. SM&A – as with the ability of the organization to perform the steps in their process.
- Must consider the role of technology used by the organization as part of writing proposals.

### ***Prerequisites and Enabling Conditions:***

- Commitment to perform – i.e., providing adequate funding and resources.
- Ability to perform – i.e., having sufficient training to assure that proposal participants have needed competencies.
- Ability to perform – i.e., having proposal teams organized to support writers through a well-planned hierarchy of writing assignments and leadership roles.

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## Benchmark Criteria and Success Factors

Study Area (BAE and Others)	Benchmark Criteria	Success Factors
Using proposal plans, directives, or other planning tools and aids	<ul style="list-style-type: none"> <li>• Extent to which planning is linked to business development life cycle with customer, specific strategy development, and management reporting</li> <li>• Extent to which planning is reinforced by software tools and management procedures</li> <li>• Extent to which enforced safeguards assure that proposal planning takes place in a timely manner</li> </ul>	<ul style="list-style-type: none"> <li>• Document repeatable process to assure that planning is routinely performed and systematically validated.</li> </ul>
Managing proposal resources	<ul style="list-style-type: none"> <li>• Degree to which there are objective tools for scoping proposal team requirements</li> <li>• Extent to which these factors are weighed when assessing resources:               <ul style="list-style-type: none"> <li>– Available time and money</li> <li>– Ability to win</li> <li>– Strategic significance of customer</li> </ul> </li> <li>• Extent to which resources are systematically prioritized for proposals versus other tasks</li> <li>• Provisions to assure that the BD function has the ability to access needed resources</li> </ul>	<ul style="list-style-type: none"> <li>• Record how quickly proposal resources are allocated.</li> <li>• Record how adequate proposal resources are in terms of availability and performance.</li> <li>• Record amount, expertise, and timely response of contributed resources.</li> </ul>

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Study Area (BAE and Others)	Benchmark Criteria	Success Factors
Using Storyboards (BAE)	<ul style="list-style-type: none"> <li>• Efficiency in translating guidance and relevant information to writers</li> <li>• Balance between ease of use and demand for rigorous attention to planning requirements</li> <li>• Extent to which use is “organic” and embedded in actual writing processes</li> </ul>	<ul style="list-style-type: none"> <li>• Record clear links to subsequent writing tasks and ability to perform those tasks.</li> <li>• Track what percentage of answers include effective visuals.</li> <li>• Record use of secondary devices that facilitate writers’ ability to plan their writing.</li> </ul>
Identifying customer’s hot buttons and key requirements	<ul style="list-style-type: none"> <li>• Effectiveness in discerning customer’s most significant needs and business goals</li> </ul>	<ul style="list-style-type: none"> <li>• Record list of hot buttons and key requirements; evaluate extent to which these penetrate the RFP response and are associated with your company’s capabilities.</li> </ul>
Developing themes (BAE)	<ul style="list-style-type: none"> <li>• Effectiveness of links to defined win strategies – i.e., use of “theme trees,” etc.</li> <li>• Extent to which themes are used and flowed down into actual content</li> <li>• Priority given and resources applied to developing themes</li> </ul>	<ul style="list-style-type: none"> <li>• Verify that themes are appropriate as part of writing process.</li> <li>• Use secondary devices to facilitate writers’ ability to prepare and use themes:               <ul style="list-style-type: none"> <li>– Are writers guided by ordered steps to enable incorporating themes?</li> <li>– Are writers given samples of desirable syntax and messaging?</li> </ul> </li> </ul>

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Study Area (BAE and Others)	Benchmark Criteria	Success Factors
Developing content	<ul style="list-style-type: none"> <li>• Extent to which content is developed as an “organic” extension of storyboarding and thematic development</li> <li>• Extent to which content development is actively supported by reuse library</li> <li>• Extent to which visuals are used to convey compelling information including               <ul style="list-style-type: none"> <li>– your understanding of customer’s culture and needs</li> <li>– your company’s effectiveness in meeting those needs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Use secondary writers’ aids that provide guidance to develop good first drafts.</li> <li>• Record what percentage of reusable content is in discrete “ready to use” syntax, versus bulk files of previous proposals.</li> <li>• Record what percentage of answers and narrative include visuals.</li> <li>• Record effectiveness of visuals by testing with appropriate focus group.</li> </ul>
Timing of proposal kick-off with respect to baseline development (define baseline development) (BAE)	<ul style="list-style-type: none"> <li>• Clarity of links between offering baselines and written descriptions in proposals</li> <li>• Organizational assignments that align roles for baseline development and proposal writing</li> <li>• Strength of links between stakeholder roles and responsibilities across proposal and baseline development tasks</li> </ul>	<ul style="list-style-type: none"> <li>• Track use of formal mechanisms to facilitate real-time communication between interdependent roles. (examples?)</li> </ul>
Using competitive intelligence to ghost weaknesses of other bidders	<ul style="list-style-type: none"> <li>• Specificity of competitive information and ability to translate that to winning differentiators for your company</li> </ul>	<ul style="list-style-type: none"> <li>• Record how current competitive intelligence is and how effective it is in providing a winning differentiator.</li> </ul>
Discovering and incorporating price-to-win/cost-to-win (BAE)	<ul style="list-style-type: none"> <li>• Extent to which theme development reflects specific cost/price strategies</li> <li>• Degree of integration between elements of the baseline development process</li> </ul>	<ul style="list-style-type: none"> <li>• Track use of formal mechanisms that include the outputs of price-to-win/cost-to-win into storyboarding and theme development activities.</li> </ul>

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Developing and incorporating case for Total Cost of Ownership/Return On Investment	<ul style="list-style-type: none"> <li>Potential effectiveness of financial case in persuading customer</li> </ul>	<ul style="list-style-type: none"> <li>Verify that financials are accurate, and use tools based on sound accounting expertise.</li> </ul>
Handing management reviews (timing, frequency, depth/level) (BAE)	<ul style="list-style-type: none"> <li>Extent to which reviews acknowledge the constraints of proposal development</li> <li>Level of integration of reviews within the defined progression of the proposal process</li> <li>Appropriate links of depth and level of reviews to types of proposals</li> </ul>	<ul style="list-style-type: none"> <li>Clearly define the relationship of reviews to a reasonable balance of internal and external stakeholder value.</li> </ul>
Using gates to control proposal development (BAE) Using Bid/No Bid discipline and upper level management support to decide subsequent action	<ul style="list-style-type: none"> <li>Level of definition for decision points as actual, productive steps in the writing process</li> <li>Extent to which executives involved in gate reviews are actually engaged in proposals</li> <li>Extent to which resources are deployed on winning proposals versus those with slim chance of success</li> </ul>	<ul style="list-style-type: none"> <li>Clearly define the relationship of reviews to a reasonable balance of process control and added value.</li> <li>Record percentage and extent of executive engagement: how many executives and how much time?</li> <li>Per proposal per customer track resources used and success rate.</li> </ul>
Using proposal templates, boilerplate sections, compliance matrices, etc. (BAE)	<ul style="list-style-type: none"> <li>Extent to which templates and reuse material facilitate preparation of a “good first draft”</li> <li>Level of integration of compliance matrices into storyboarding and draft writing processes</li> <li>Heuristic use of proposal templates</li> </ul>	<ul style="list-style-type: none"> <li>Record metrics on usability and utility of reuse libraries – e.g., percent of first draft from reuse material, feedback on amount of tailoring of reuse material, and percent of authors using templates</li> </ul>

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Study Area (BAE and Others)	Benchmark Criteria	Success Factors
Managing Team information	<ul style="list-style-type: none"> <li>• Formal application of communications strategies as part of proposal plans</li> <li>• Specific consideration of who needs what information to perform proposal tasks: extent to which tiers of distribution lists, based on Need To Know, are used</li> <li>• Strategies for inclusion of subcontractors and team member personnel in communications</li> </ul>	<ul style="list-style-type: none"> <li>• Track amount of rework due to lack of adequate communication of proposal strategies, etc.</li> </ul>
Integrating personnel and input from subcontractors or team members	<ul style="list-style-type: none"> <li>• Clear guidance on managing subcontractor and team member personnel and input as part of the proposal planning process</li> <li>• Specific provision for integrating personnel and input from subcontractors and team members</li> </ul>	<ul style="list-style-type: none"> <li>• Track use of secondary tools and collaboration techniques defined and in place to facilitate participation of subcontractor and team member personnel. Some examples of tools include templates, style guides, and mandatory methods for managing files and formats.</li> <li>• Track response of subcontractors and team members in terms of timeliness, effectiveness, and level of cooperation.</li> </ul>
Managing proposal production, including graphics	<ul style="list-style-type: none"> <li>• Extent to which production management is addressed in the proposal planning process</li> <li>• Differentiation of skills and competencies within the proposal team to minimize production issues</li> <li>• Inclusion of production management as part of formal proposal configuration control</li> </ul>	<ul style="list-style-type: none"> <li>• Record quantitative metrics for predicting production requirements and controlling production “flow.”</li> </ul>

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Using executive summaries	<ul style="list-style-type: none"> <li>• Strategic view of proposal executive summaries as part of proposal development process</li> <li>• Executive summaries as timely, formal outputs from early solution teams</li> </ul>	<ul style="list-style-type: none"> <li>• Use embedded processes including mandatory deadlines and reviews for progressively developing executive summaries.</li> <li>• Track extent to which winning financial case is included in executive summary.</li> </ul>
Using cover letters	<ul style="list-style-type: none"> <li>• Cover letter signed by executive who holds maximum credibility with customer's decision makers</li> </ul>	<ul style="list-style-type: none"> <li>• Track steps to identify executive early in process and quickly secure executive's participation.</li> </ul>
Managing proposal configuration	<ul style="list-style-type: none"> <li>• Extent to which formal configuration management techniques are applied to proposals</li> <li>• Level of automation incorporated into proposal configuration management process</li> </ul>	<ul style="list-style-type: none"> <li>• Quantify and record formal procedures and other guidance on managing proposal configuration.</li> </ul>
Timing and using peer/stakeholder reviews	<ul style="list-style-type: none"> <li>• Level of integration of peer reviews within the defined progression of the proposal process</li> <li>• Appropriate linkage of depth and level of reviews to types of proposals</li> <li>• Thorough penetration of win themes and compelling differentiators, especially financial differentiators.</li> </ul>	<ul style="list-style-type: none"> <li>• Clearly define the relationship of reviews to added value.</li> <li>• Track and record occurrence and degree of effective expression of win themes and differentiators.</li> </ul>