



# *Effective Use of BD and Proposal Management Consultants*

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Ken Tooke, President  
Tooke & Smith Consultants LLC





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“Nothing happens in any company until  
after a sale is made.”

--T. Watson, Sr.  
Founder & CEO, IBM



## ***How BD/Proposal Consultants Can Help Your Business***

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- Enhance strategic/business planning processes to outline growth strategies and tactics
- Identify and mitigate gaps in business functions versus best practices to maximize efficiencies and profitability
- Develop/refine BD, opportunity identification, capture planning, and proposal management processes to increase market share
- Identify opportunities with other firms through teaming, joint ventures, and M&A



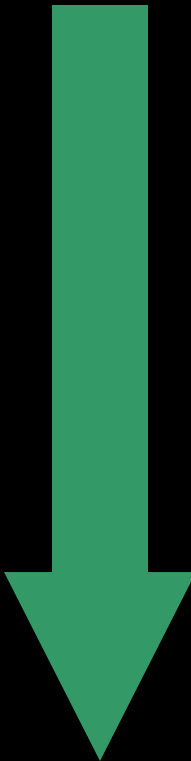
# *Setting the Baseline for Success*

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- Government practices Darwinian theory
  - “Survival of the Fittest”
- Outline your business plan
  - “Failing to Plan is Planning to Fail” [Alan Lakein]
- Be opportunistic, but don't be naïve in pursuing opportunities
  - Save money, don't bid if not positioned
- Choose consultants carefully to avoid wasting time and money
  - Ensure the consultant works within your budget and will add value to the process

# *Marketing/BD Process Outlines the Approach for Business Growth*

Top-Down  
Management  
Influences



Corporate Mission Statement

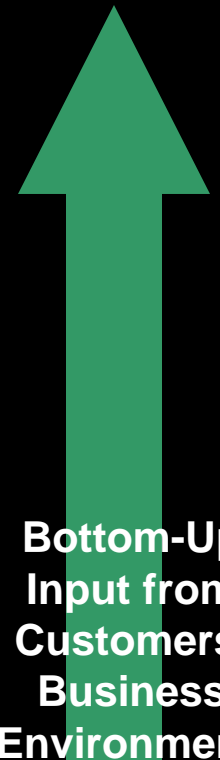
Strategic Plan (3 to 5 Years)

Annual Business/Marketing Plan

Pursuit and Capture Plans

Proposal Management Plans

Bottom-Up  
Input from  
Customers,  
Business  
Environment,  
Competitors,  
Owners, and  
Investors





# ***Today's Agenda Addresses Strategy, BD, Proposal Processes***

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- Discuss general approach to key business processes critical to increasing growth, efficiency, profitability
- Outline how to best use consultants to enhance your internal capabilities without breaking the bank
- Key business areas include:
  - Strategic planning
  - Infrastructure development/improvement
  - Business development and marketing support
  - Capture planning
  - Pre-RFP planning
  - Proposal management and development



# *Strategic Planning*

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## ***Strategic Planning Process— Translating Ideas into Action***

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- Define Key Results Areas you want to achieve
- Understand current and future priorities of targeted customer segments (key success factors)
- Explore each market for threats and opportunities
- Analyze strengths (core competencies) and weaknesses relative to key success factors and competitors
  - Determine elements that should be grown or bought to create or maintain competitive advantage



# *Strategic Planning—Key Steps*

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- Develop strategic plan to establish longer term direction for your company; ensure vision/mission statements are reflective of the ultimate strategic plan
- Prepare Business Plan with measurable goals and assess progress monthly
  - Ensure plan addresses all aspects of business (operations, finance, marketing, HR)
- Prepare programs, policies, plans (tactics) to implement strategies
- Adjust organizational structures, decision processes, information and control systems, HR, company processes and procedures as needed to reflect best practices
- Monitor performance; plan for and respond to contingencies or environmental/market changes



## ***Ways to Use Consultants to Support Strategic Planning***

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- Identify market trends, issues, and new/latest developments, particularly key success factors
- Baseline competitive framework
- Identify new markets and strategies for obtaining work in these markets
- Facilitate SWOT analysis and strategy process
- Provide insights/direction as strategy evolves, support ongoing monitoring



## *Things to Remember*

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- You can't outsource strategic planning...must be led by executive management
  - Develop the plan in house, use consultants to direct, review
  - Need to have disciplined approach and follow through
- It doesn't need to be a treatise or perfect...don't get stuck spending weeks on research or immobility
  - Do sufficient research to make decisions
  - Final plan should be 3-5 pages with goals/tactics outlined
  - Be sure to distribute to all staff and link to performance goals
- Don't be unrealistic and make sure you prioritize short- and long-term objectives
- Revisit and adjust the plan at regular intervals



# *Infrastructure Development/ Improvement*

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## ***Develop Best Practices to Enhance Efficiency, Win Proposals***

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- Compare and contrast existing operational systems, processes with best management practices
- Identify current systems/processes and gaps in capabilities to win Federal work
  - Evaluate financial management, cost accounting, contracts/procurement, H&S, QA/QC, data management, resource management, program/project management, IT, HR
- Develop prioritized plan of action linked to greatest need and potential payback, increased profitability
- Identify costs and be sure the plan is affordable



## ***How to Use Consultants to Support Infrastructure Improvement***

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- Compare internal operations versus best practices and competitive baseline and identify gaps
- Facilitate development of tactics to mitigate gaps
- Support development of plans, processes, and procedures
  - Don't recreate the wheel...things you need often have already been developed and can be tailored to your specific needs
- Support ROI analysis and prioritization of activities and investments



## *Things to Remember*

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- Approach needs to be led by internal resource (Task Master) who has capabilities to facilitate the process
- Be sure to research major purchases and think about future plans and needs
  - Cost accounting system (i.e., QuickBooks) might seem OK today but what about in two years? Should you buy Deltek?
- If you need strategic hires, use a recruiting firm or leverage your own network
- Without an implementation plan, you're wasting your time; be sure to prioritize your needs
- Many processes can be improved with minimal investment...just need to identify and implement



# *Business Development and Opportunity Identification*

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## ***BD/Marketing Process Focuses on Knowledge and Relationships***

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- Identify strategic clients and develop marketing plans to identify key success factors, goals, expected revenue, and profitability
  - Goals should flow down from your Business Plan
- Implement Strategic Account Management to focus your resources on key clients
- Establish an approach that includes performance metrics to measure cost and progress toward goals
- It's all about knowing more than the other guy and positioning and leveraging relationships to win work
  - Clearly outlining in-depth knowledge of customer issues and providing an approach that solves those issues wins proposals



## ***Opportunity Identification Should be Structured and Disciplined***

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- Don't waste time pursuing work that you're not effectively positioned for
  - Your likelihood of winning is not high
- Focus on fewer opportunities to win work; take your shots but increase your chances through a structured approach
- Identify opportunities by tracking ongoing contracts (AFCEE ECOS coming up for rebid in the fall)
- Obtain data from client visits



## ***How to Use Consultants to Support BD and Opportunity ID***

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- Build BD capabilities internally; use consultants as you grow to support the process
  - You need to stay connected via BD network
- Use consultants to verify or challenge your chances of winning a particular contract or project
- Obtain general information by using consultants to visit client and obtain call reports with the data
- Use consultants as “door openers” for clients you’d like to work with but have no relationships
  - Get to the decision makers and influencers
- Leverage knowledge of clients/opportunities to identify potential contracts to pursue



## *Things to Remember*

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- Focus resources...you can spend a lot quickly (internally and externally) with little to no return on your investment
- Good consultants will challenge your ability to win
- Don't try to be all things to all people...one of the quickest ways to get into trouble
  - Sell what you're good at (core competencies) and build/expand your business once you get contracts (fly wheel) in place
- Communicate your strategic/business plan to employees (and others) so everyone understands BD goals and is in alignment to achieve those goals
- Client-focused strategy is key to business growth



# *Capture Planning Process*

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# *Overview of Federal Procurement*

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- Procurement cycle begins with identification of need; lasts 18-36+ months based on complexity
- Acquisition Plan initiates formal process
  - Outlines justification, contract type, scope, RFP instructions and evaluation criteria
- Pre-solicitation (FedBizOpps) and RFP outline requirements
- Source Selection Authority (SSA) responsible for overseeing process and approving final selection
  - SSEB (Source Selection Evaluation Board) makes recommendation to SSAC (Source Selection Advisory Committee), which reviews and briefs the SSA



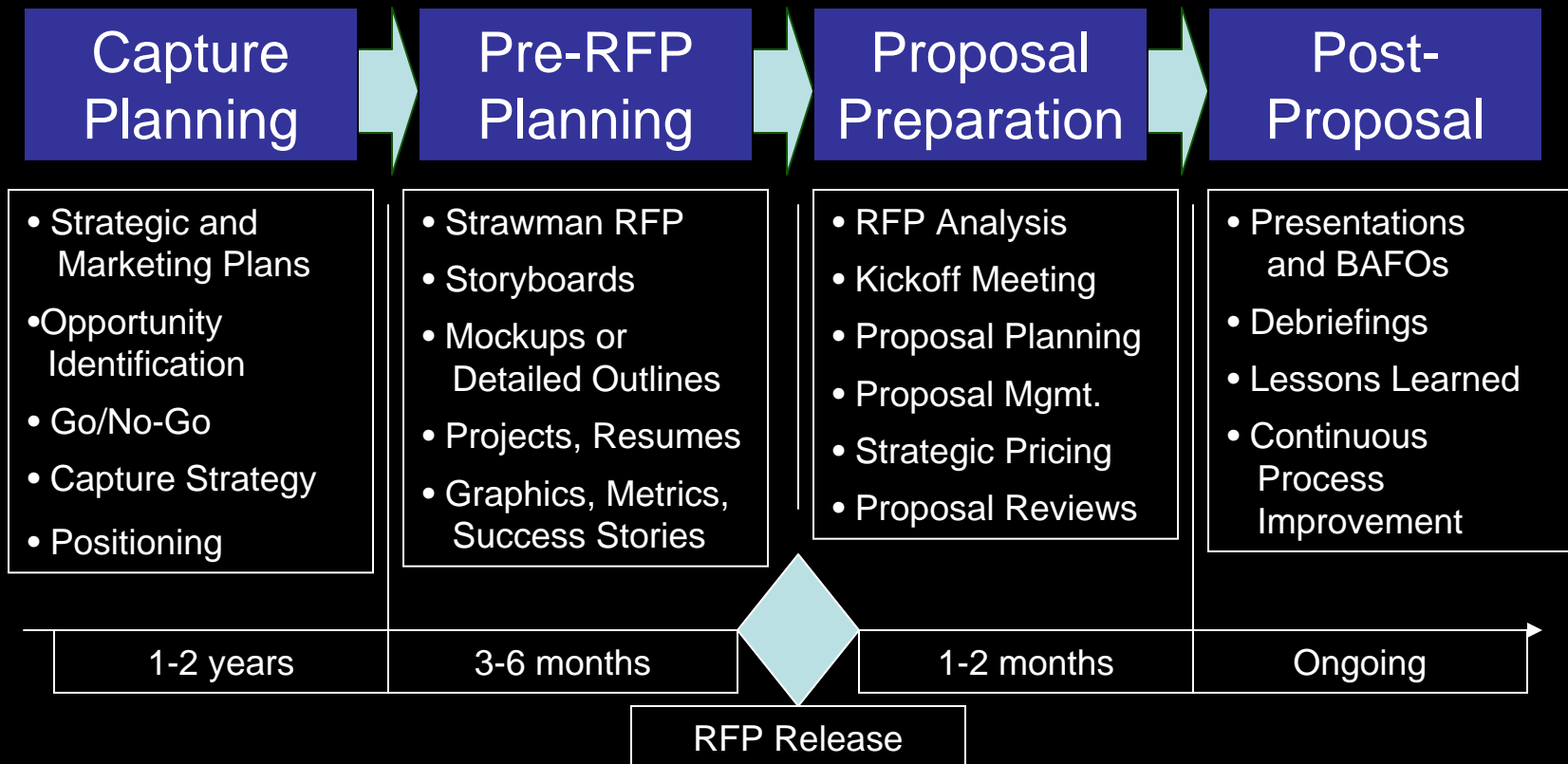
# *Industry Corollary Activities*

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- Identify opportunity through ongoing BD efforts; make initial go/no-go decision (pre-Acq Plan)
- Develop/update capture plan and obtain intelligence, conduct positioning (Acq Plan)
- Develop “strawman RFP” and develop storyboards and mockups (pre-RFP)
- Analyze RFP requirements, modify mockups and develop proposal (proposal development)
- Use proposal best practices to maximize efficiencies and cost savings

# Overall Capture Process Outlines

## Capture Planning & Proposal Activities



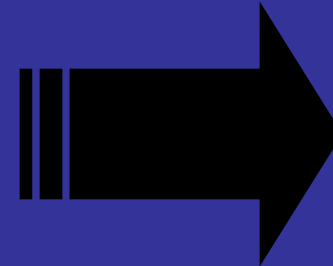
# *Structured Capture Planning Process Provides Roadmap for Winning*

## **External Analysis**

- Client Analysis
- Opportunity Analysis
- Competitor Analysis

## **Internal Analysis**

- Capabilities Analysis
- Financial/Price Analysis
- Risk Analysis



*Strategic Gap  
Analysis*

## **Capture Strategy**

- Client Positioning
- Intelligence Collection
- Teaming
- Contact Plan
- Marketing Communications
- Internal Actions

**Implementation, Control, and  
Monitoring System**



## ***Capture Planning Outlines Client Needs and Approach to Win***

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- Hold initial capture meeting to identify client, competitor, and opportunity requirements
- Evaluate internal strengths/weaknesses compared to client needs and competitor strengths/weaknesses
- Identify gaps in capabilities to perform work and satisfy all client needs and requirements
- Develop the plan and routinely evolve/update the plan as new/additional information becomes available, i.e., “work the plan”
- Mitigate gaps through teaming and other actions



## ***How to Use Consultants to Support Capture Planning Process***

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- Facilitate capture strategy development; leverage client knowledge and insights
- Identify critical gaps and support teaming
  - Leverage consultants' network to identify and establish teaming arrangements
- Use consultants to review strategy and challenge ability to win the contract
- Use consultants as the driver to update the capture plan and ensure progress is made



## *Things to Remember*

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- Capture strategy won't work if not effectively implemented...it's all about discipline
- Integrate ongoing BD efforts with capture planning to maximize cost efficiencies
  - Be sure to capture BD capture activities into marketing plans
- Rank/weight client needs to ensure your approach is appropriately aligned and focused on winning
  - Don't be afraid to ask for your client's input on those things that are important
- Start early and continue to build your position and capabilities to satisfy all client requirements
  - Be careful of cost as RFP release slips every now and then



# *Pre-RFP Planning*

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## ***Use Pre-RFP Planning to Perform Some of the Heavy Lifting***

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- Develop the “strawman” RFP as basis for responding
  - Find previous RFP, review similar RFPs, obtain client intel
- Transition the capture plan to the proposal mgmt plan
  - Finalize proposal strategy and win-theme statements
- Outline the project execution plan
  - Understand how the work will be managed/performed before writing the management plan or organizational approach
- Finalize project descriptions and key personnel
  - Establish format, interview staff and write drafts
- Develop storyboards and mockups for key sections
  - Storyboards allow you to brainstorm your approach and ensure the section is focused on addressing client needs
  - Mockups allow you to elaborate upon your approach, organize your thoughts and ensure messages are easy to find

# *Proposal Development Strategy*

## **Marketing Intelligence**

- On Customer
- On Competitors
- On Opportunity
- On Ourselves

## **Discriminators**

- Important to Customer
- Differentiate us from competition  
--Pure, Partial and Me-Too

## **Strategy Statements**

- Emphasize our strengths
- Mitigate our weaknesses
- Neutralize competitor strengths
- Highlight competitor weaknesses

## **Bidder Comparison Chart**

- Ranks us and competitors on each major discriminator from perspective of customer



## ***How to Use Consultants to Support Pre-RFP Planning Process***

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- Determine “strawman” RFP that agency plans to use
  - Provide access to previous RFPs and history with similar proposals (institutional knowledge)
- Support storyboard and mockup development; facilitate initial storyboard meeting
- Prepare storyboards and mockups
- Develop templates, example PD, and example resume as cost-effective alternative; obtain insights as to best development approach



## *Things to Remember*

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- Don't wait for the RFP if you don't need to
  - Use Pre-RFP planning to extend time to prepare and reduce levels of stress related to tight deadlines
- Well-thought-out approaches (execution plans) will score more highly
- Develop proposal themes to guide writing efforts and emphasize key points
- Develop proposal management plan as your guide for managing the proposal effort



# *Proposal Management and Development*

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## ***Best Proposal Practices***

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- Develop metrics list to enhance consistency and success stories repository to minimize rework
- Hold daily standups to maximize communication; maintain “dummy” book
- Develop/finalize graphics before allowing writers to perform any writing; maximize use of graphics
- Ensure proposal manager does not write, but functions as reviewer/critic for others



## ***How to Use Consultants to Support the Proposal Management Process***

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- Only use consultants to manage proposal if you have an established working relationship
  - If not, retain proposal management in house
- Use consultants to develop/write key proposal sections (more highly evaluated) but be sure that they understand your capabilities, strengths, etc.
- Finalize strategy and outline approach (i.e., confirm page allocations, develop formats, content)
- Participate in reviews (Pink, Red, Green, Gold)



## *Things to Remember*

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- Plan for contingencies, things will fail and/or break at some point with the best planning
- Remember—everything takes longer than you think it will (creative process)
- Control costs of slippage by slowing momentum, never stop unless you experience a lengthy slip
- Understand your audience--tailor strategy, themes, writing accordingly
- Solve the client's needs--link features to benefits and provide proofs of performance
  - Apply the “so what” rule to flesh out benefits
  - Be specific and quantify to enhance credibility
  - Develop “jumping off” points to help reader



## *Carefully Choose Your Consultant*

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- Ask around...if they're any good, they should have a reputation for winning; ask about track record and winning proposals
- Define scope early on and get an estimate and set up the contract in a fashion that makes sense and allows you to control cost, i.e., NTE
- Make sure you can work with them effectively
- Ensure they have capability and capacity to deliver and address your specific requirements
- Assess business integrity and any potential conflicts



## *Tooke & Smith Consultants*

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- Web site—[www.tookesmith.com](http://www.tookesmith.com)
- Ken Tooke (610) 909-0654
- [ken@tookesmith.com](mailto:ken@tookesmith.com)