

The
Very Best of

The Proposal Guys



BJ Lownie & Jon Williams
www.theproposalguys.com

“ Welcome to the very best of 'The Proposal Guys'! We've selected some favorites from our blog to share with you here. If you're already one of the hundreds of readers each week who enjoy the site, thanks for joining us. And if you're new to the blog, do stop by! ”



BJ Lownie

BJ here: the “older and wiser” of the two 'Proposal Guys'. I've been around proposals for a while now (20+ years). I've worked on a few (OK, 100's) proposals and presented to a fair number (OK, 3000+) participants in proposal workshops. A founder member of APMP and an accredited Proposal Professional, I present regularly at industry conferences: like Jon, I confess to being passionate about proposals!



Jon Williams

Hi! I let BJ go first: “age before beauty”, that kind of thing. I started out in purchasing, evaluating proposals, before seeing the light and swapping into proposal management. Since then, I've run one of the largest strategic proposal centers in Europe, and now work with proposal teams in the UK and around the world. I'm a Fellow of APMP – and, like BJ, an accredited Proposal Professional.

www.theproposalguys.com

March 14, 2006

Time for a proposal management blog!



Jon

BJ and I are sitting in the back of a cab in Sydney. We're both on the opposite sides of the earth to home, heading off to deliver a training course, and we get to chatting how we both love writing for pleasure. We're forever exchanging notes and quips about proposals.

So I pipe up, "We ought to have a blog!"

And BJ agrees, and so here we are. (Well, here we are in the sense of writing the text. It'll take us a couple of weeks to work out the technology, and then we'll post whatever we've written to date en masse). Of course, there are some who'd think us sad for talking about proposals and blogs rather than looking out of the window at the Opera House...

March 15, 2006

The need for proposal training



Jon

Depressing comment from Emily, a participant on today's course for proposal staff drawn from across Australia: "On my first proposal, I cried every night". Interesting how many people start work on proposals by being thrown in at the deep end, with no prior experience and no training. And yet Emily's first proposal would have won or lost her company a potentially important piece of business.

I'm glad airlines don't take the same approach. I can just imagine flying home on Saturday and hearing the greeting, "Hello from the flight deck, Sam here. A group of us were standing round at the airport in uniform, and they picked me out to fly the plane tonight. Not done it before, so fasten your seatbelts tight, and here's hoping that I can work out what all of these levers are for."

I so love getting companies to realise that developing a proposal isn't a trivial task to be passed over to whomever happens to be at a loose end that day – or to be undertaken with no training whatsoever.

March 23, 2006



Cool words

BJ

I think we should formally recognize the ability of proposals to generate entirely new words. I suggest we recognize a new science and call it ‘Newwordology’ – n, The science of creating and using words that previously did not exist. Often consists or corrupting a word, changing the spelling, misapplying a word, combining two or more words.

Examples:

‘Clumbersome’. adj. Combining clumsy and cumbersome. To be both clumsy and cumbersome.

‘Aforegoing’ – adj. Combining ‘fore mentioned’ and forego. Means to mention and then immediately dismiss.

I know Jon has seen a fair number of newly coined (not to be confused with minted) words. And I’ve sure many of you reading these entries have a few of your own....and I’d enjoy to hear them.

April 26, 2006



Learning reviews are a waste of time

Jon

Well, they shouldn’t be, of course. But the sad reality is that (from the perspective of the proposal team, at least), they usually fail to lead to any real change.

Debating this with a client in Germany shortly before Easter, I came up with a list of four disconnects that act as barriers in the process for lost deals – even if a review does take place.

First, there’s the disconnect between the real reasons why a vendor lost and the story that buyer tells to the salesperson. So much easier as a buyer to send the account team away with “you lost on price” (and hence aren’t personally to blame) than to tell the whole truth.

Second, there's the disconnect between whatever the buyer tells the salesperson, and the spin that the salesperson feeds back to their organisation. There's a degree of self-protection at play, resulting in sanitised messages and "it wasn't my fault".

Third, there's the disconnect between the messages the salesperson feeds back, and any learning specifically about the quality of the proposal. It's vital for the organisation to know about pricing, solution quality and suchlike. But the proposal team need to know what the buyer thought of the document itself (and how it compared to those of their competitors), and these topics are rarely discussed.

And finally, there's the disconnect between the outcomes of the review and the actions that should result. I can often look back over a dozen learning reviews that an organisation has conducted over the past six months, to find that they all show the same fundamental causes – yet nothing substantive has been done. If you don't schedule the follow-up checkpoints with someone with clout – to take place (say) three months later - nothing will happen.

May 5, 2006

Build it like Beckham

Jon



A lovely story in The Guardian newspaper this morning – and if BJ's allowed a baseball analogy, no-one's going to stop me quoting a soccer story that sparked some proposal-related thoughts.

Bill Beswick, a sports psychologist, was brought in to work with Manchester United when their star player was David Beckham.

Before training one morning, he tried to motivate United's players by telling them a tale of three bricklayers. Asked what he was doing, the first replied "laying bricks" and the second said "earning £10 an hour" but the third said he was "helping to build a beautiful cathedral where I will bring my kids".

Apparently Beckham promptly scored a wonderful goal on the practice pitch and celebrated by screaming: "Cathedral 1 Bricklayers 0."

Makes me wonder what proposal managers are doing each day. Are we “getting a document out of the door”; are we “paying the mortgage”, or are we “telling the stories that bring in business and keep our co-workers employed”?

May 21, 2006



Prepared to win?

Jon

For me, one of the most important processes in the proposal lifecycle is Pre-Proposal Planning. We coined this phrase a few years back, to capture those activities that a proposal team should undertake prior to receipt of the customer’s RFP. I want to make sure that by the time that RFP arrives, our team is ready to rock and roll; that we’ve captured all of the necessary information about the customer’s needs and our competitive landscape; that we’ve influenced and conditioned the customer to expect us to win.

Chatting about this with one of our team members recently, I hit on an analogy... Imagine your favourite sporting team, about to play in the biggest game of the year. For BJ, it could be the Yankees on the eve of a World Series; for me, Liverpool coming up to a European Cup soccer final.

The coach gathers the players together, 24 hours before the big match. “I’ve just checked my diary, and noticed we’ve got a match tomorrow. Anyone free – hope no-one’s planned a day out with the family? Tell you what, let’s meet up in the parking lot outside the stadium – say half-an-hour before the game starts? Not sure who’ll be on the team – we can have a chat about that once we get there. And don’t forget to make sure your kit is washed and ironed.... Oh, and anyone read the newspapers recently? I guess we ought to check which team we’re playing against.”

That feels an awful lot like many proposal teams approaching a big deal. Of course, the top-notch sports team would have planned immaculately: studied the opponents in detail, trained endlessly, chosen their best team, trained, practised their tactics, organised the logistics and so on.

It should be no different for a professional proposal team! Of course, the level of preparation should be commensurate with the size of the deal.

But that's no different to the sports club (where the youth side will probably go through the same routine as the top team, albeit abbreviated, and the coaches won't necessarily be quite as good).

September 8, 2006



The customer's proposal journey

Jon

“The customer will expect my organisation to win, before they receive the bidders' proposals.

When the proposal documents from different vendors sit on the meeting room table in front of the evaluators, ours will stand out from the crowd before they've even read a word of the text.

The title page of our proposal will persuade them that ours is the document that will capture their hearts and minds.

As they scan through the documents for the first time – flicking through the pages, their eyes alighting only on the titles and graphics – they'll be convinced that ours is going to be the best.

By the time they've finished the Table of Contents, they'll be excited about reading the rest of the document: section titles alone will demonstrate our understanding and our differentiation.

The Executive Summary will establish clear blue water between our approach and that of our competitors.

The proposal Q&A (or sections in a pro-active proposal) will re-confirm our compelling story, expanding on and validating our win themes.

Our conclusions section will ensure that they close the book with our key themes clearly in mind.

Our proposal presentation will re-enforce their decision that we're the people with whom they want to do business.”

How did you do on your last effort?

September 20, 2006

If it's all about price...

BJ

...then help me understand Starbucks.



Thursday, September 21, 2006

Starbucks revisited

Jon

And while we're talking about Starbucks... Would anyone care to explain the difference between the following two (genuine) Starbucks drinks: a triple long extra pump white mocha and a tripe long espresso con panna with white mocha.

Answer? \$1.50

That's right. \$1.50. Note that I didn't say anything about differences between the two drinks. Because they're identical.



September 27, 2006

Something's missing

BJ

While picking up my coffee this morning at my local Dunkin' Donuts, I noticed a sign on the counter. The sign, promoting their omelet on a bagel, read:

The ingredients in your omelet are –

- * Red bell peppers
- * Onions
- * Potatoes
- * Mushrooms
- * Bacon

As I read this I had this nagging feeling that something was missing here. After a few seconds, it hit me.

Did you notice it? Right. Seems that whomever put this marketing piece together (and it was nicely done and had a very official looking #54328-91B on it so I'm guessing it came from corporate) was so focused on all the extras, they missed the main ingredient.

Need I point out the parallel to some proposals? 😊



October 2, 2006

It's 90% Preparation, 10% Perspiration

BJ

Okay, maybe that's not exactly how the quote goes. But it certainly applies to this entry.

Over the past weekend my wife and I have been painting. This has been on my wife's ever expanding 'honey do' list for some time now.

Now, I've done a fair amount of painting in my time (and yes Jon, the readers do appreciate that would be quite a long time. I don't think they need you to point that out. At least not every time.). My wife Azra hadn't



had any experience painting prior to this.

Azra was very eager to paint. As I was unloading various supplies I had purchased from the local DIY store (that's British speak for 'Do It Yourself' for those who haven't spent much time in England – what we know simply as Home Depot), Azra already had her brush in hand.

I pointed out that we had a good deal to do before we could start painting. First we had to move all the furniture to the center of the room. Then we needed to remove all the switch plates from around the many outlets and wall switches in the room (approximately 237 or so it seemed after dealing with all those tiny screws). Once done with that we had to put down drop clothes and cover everything.

Azra was not happy to hear that she'd have to do all this before she was able to start painting.

And there was more preparation to do before the painting started. We also had to tape all the edges. This would allow us to move quickly and easily, doing most the major section with a roller, as the tape would protect the edges. But this also meant we'd have to, in painters' terms, 'cut in' the edges (painting the edge with a brush, because the roller can't get in there).

With an impatient Azra wondering if she'd ever get to actually paint, we finished getting the room ready to paint. The preparation took us more than 2.5 hours.

Finally, we were able to start painting. Azra had all sorts of fun, and as you'd expect of a novice painter, ended up wearing a fair amount of paint herself (let me know if you want to see the pictures). And in no time at all (about 45 minutes), the first coat was up and on and the room had been transformed (for those who care about such things we had painted Bright Biscuit #456-98 over the original Oyster White #SW764).

Azra was quite amazed at how little time she'd actually painted, and how much time we'd spent on preparation.

As with other entries, I need not point out the obvious parallels, right? 😊

November 3, 2006



The Mythical Proposal Manager

Jon

We fell into a discussion recently about roles within a proposal centre, considering the variety of skills needed to pull together a first-class document. To quote from a note I fired off to a friend who runs a proposal centre in the States:

“Oh that it was easy to get someone who could simultaneously conduct that orchestra superbly, write an award-winning book, and draw a masterpiece... and that clients gave us long enough for one person to do everything necessary from a proposal perspective”.

But, of course, these are very different skills – and time pressures mean that some sub-division of labour is essential. Either that, or affordability means that there has to be a trade-off.

So what of the “Proposal Manager” – “the conductor”, if you like? Take excellent project and people skills, and add in a healthy dose of creativity and lateral thinking. Make sure they’re a great facilitator, and adept at building internal relationships (often at the most senior levels). Check they can combine almost-paranoid attention to detail with an uncanny ability to help the team to see the big picture. Verify their ability to be calm under pressure, and to work brilliantly at six in the morning, on three hours’ sleep.

Require them to be highly “proposal savvy”. And (if it’s possible) make sure they know their way around your organisation and understand your market too – although this would be the area in which I’d compromise if I were recruiting for the role: a great proposal manager can lead a proposal team selling breakfast cereal to a supermarket or business-critical technology services with equal aplomb. But at least make sure they’re great strategic reviewers – able to dissect draft text and see where improvements need to be made, pushing towards a truly excellent document.

Finally, in some organisations, offer this mythical being the salary of a glorified administrator. And then wonder why you can’t get the staff!

Of course, these competencies are very different to those of a great Proposal Writer (brilliant at editing text and building one-to-one

relationships with content contributors, but liable to run a mile if asked to stand up and facilitate a workshop). And the skill-set is poles apart from the great Word and design skills of a good Document Manager. But hey, we can expect them to do all of this brilliantly as well, right?

November 8, 2006

Boxing Clever?

Jon



I was tempted, when writing a recent post about the characteristics of a great Proposal Manager, to include the phrase “able to think outside the box”. And then I stopped myself, remembering the two perfect ripostes to that particular clichéd phrase:

“He’s great at thinking outside the box. The problem is that his box is so small to start with.”

and

“I’ll be more enthusiastic about encouraging thinking outside the box when there’s evidence of any thinking going on inside it.” (Terry Pratchett)

If anyone can pinpoint the author of that first quote, which I picked up somewhere on my travels a few years back, I’d love to be reminded.

January 9, 2007

Getting control

Jon



Some organisations’ approach to proposals can best be described as “Disorganised chaos”. Yet it’s only two steps from there to being in control:

Disorganised chaos

Organised chaos

Organised

Where are you on the journey?

January 23, 2007



Those Who Need It Most

BJ

My experience has been that those who need to make improvements most, are the least open to admitting the need or seeking help.

A recent experience with workshops that Jon and I delivered highlights this.

Within this particular company there are two divisions, and we delivered the same workshop to both.

One of these divisions produces proposals of a fair to good quality (based on an audit using standardized criteria), and has a win rate of about 40%. The other division produces proposals that are very poor (based on the same audit and criteria), and their win rate is below 10%.

The group with the higher quality and win rate saw the value of conducting the workshop, had a positive attitude and an open mind, and actively participated.

And the other group? Well, you know already, right?

From the head of the group on down, they failed to recognize the need to improve the quality or win rate, questioned the need for conducting any training, and did everything possible in an attempt to not have to attend. Then, once in the workshop (yes, the powers that be got them in their seats), they were extremely negative, refused to participate, and behaved in a rude and arrogant manner.

Of course, as one would expect, the feedback from the first group stated that they got a lot out of the workshop, and early indicators show that the changes they are making are resulting in higher quality and improved win rates. And, of course, the inverse is true for the second group. They've done nothing, and if anything, things have declined further.

And the reasons for this? They are many and varied, and I dare say, not the important question. For me the more important question, and it's applicable to many situations, is how do you make sure that you are in

the first group, and that you have a realistic view as to what you're doing and looking for ways to improve.

As one who has been at the game for quite some time now (never mind Jon, they know how much older than you I am without you pointing it out!), I am acutely aware of the potential for falling into the "but that's the way we've always done it" trap, and Jon and I coach each other to always be looking at what we're doing, how we do it, and how it can be improved (no matter how good it might already be!)

Hopefully, your thinking and actions put you in the first group too.

February 22, 2007



Slides and Centres

Jon

To Tate Modern, the art gallery on the south bank of the Thames built within the former Bankside power station. The cavernous internal space has been filled with a collection of near-vertical slides, catapulting visitors - who should presumably be concentrating on the Picassos - from the upper floors to ground-level at great speed.

Quite what do the slides have to do with art, I wondered? I saw something of an analogy with the design of some bid centres. Not, I hasten to point out, that these spaces include slides to eject disruptive account managers into the car park outside at high velocity.

No, more that a good environment for a proposal organisation includes plenty of space, brightly-painted walls, toys, relaxation areas, long wall-to-ceiling whiteboards for no defined purpose other than for team members to scribble up whatever's sparking their imaginations that day...

In other words, the physical design of the centre breaks with the conventions of the office in which it's located. Content contributors joining bid teams are surprised: slightly disorientated, perhaps. They're forced to accept that this is a different type of space, where a different type of work will be called for.

Rather than the bid centre being a dispiriting area to be avoided at all costs (“they lock you in until late at night with only cold pizza to eat, you know”), by being more playful, the very design draws contributors in and allows, encourages them to approach the work at hand in a more positive manner.

Rather like the Tate’s slides and the gallery’s artwork, perhaps.

February 28, 2007

Head for the hills

Jon



I clipped a story from the papers recently about grandee 1960s prime minister Harold Macmillan. His grandson recalled a meeting at the family home.

Cabinet colleague ‘Rab’ Butler produced a pile of papers.

“What are those?” asked Macmillan.

“Policies,” said Butler.

“Oh, I beg you, not policies,” the prime minister retorted. “They come back to haunt you. Give them broad sunlit uplands, dear boy.”

I smiled at the similarity between political spin and the challenge of securing sponsorship from “on high” for programmes to deliver improvements to proposal capabilities. As proposal folks, we may be absolutely fascinated by the detail of how we’re going to improve our processes, our structures, our documents. Yet when talking to the CEO or Sales Director, we need to remind ourselves that the key to success is to paint a picture of the “broad sunlit uplands” if we want to capture their imagination and support. And budget and headcount!

March 16, 2007



The shorter the better

Jon

I present to groups of purchasers on a fairly regular basis. I've taken to asking for a show of hands: "Tell me if you've evaluated proposals in the past six months for a particular purchasing project." Ninety per cent of hands go up.

"Keep your hands up if the longest proposal won the deal." Like a flash: not a hand left in the air.

I'm reminded of Ambrose Bierce's wonderful phrase, "The covers of this book are too far apart," and also of the occasion when Mark Twain's publisher sent him a telegram insisting

"NEED 2-PAGE SHORT STORY TWO DAYS."

Twain's reply?

"NO CAN DO 2 PAGES TWO DAYS. CAN DO 30 PAGES TWO DAYS. NEED 30 DAYS DO 2 PAGES."

April 16, 2007



The Demise of the Concept Album

BJ

While I was selecting songs from my iTunes library recently, it occurred to me that the way I listen to music today is very different than it was 'back in the day'. (And yes, I can hear Jon now, "Do tell us B.J. What was it like back when music consisted of strolling minstrels?").

I'm talking about in the 70s or 80s when music was done as an album, and the artist intended the songs to be listened to in a particular order. One song introduced and led to another and the album as a whole told a story. In today's world of downloading single songs, creating playlists in whatever order the listener chooses, etc. music is listened to in a very different fashion and the idea of listening in a particular order is certainly well out of the control of the artist.

Listeners today pick and choose which songs they like, sampling here and there, selecting the songs they like, leaving others behind. They put songs in the order they feel works best for them. Based on my experiences reviewing and evaluating proposals, there is a corollary to this in the world of proposals.

A reviewer might read a proposal from the beginning and work through it in the order in which it is presented. But it's just as likely that, certainly as a first pass, they will scan the document, choosing to read some sections, stopping where something catches their attention and skip others, especially if it appears on first glance that it will be laborious to get through.

So it's our job to make sure that each individual section captures and holds the reviewer's interest and reads well as a stand alone section. We can't expect or count on a reviewer having read the sections in order and we can't assume they'll have the requisite information from one section before reading another.

When developing proposals, we need to make them work as both a single piece as well as having each section stand on its own. We need to capture the reader's attention at specific points and be prepared for reviewers to "pick and choose" information to meet their needs. This requires planning, time and specific skills. And it sure does make our job challenging, doesn't it?

April 19, 2007

Enthusiastic Dishonesty?

Jon



Thanks to a friend for sharing her favourite proposal proofreading error... in which a colleague relying on their computer's spellcheck had inevitably failed to pick up on the rather significant difference between the words 'like' and 'lie'.

As in:

"We always lie to satisfy our customers."

May 1, 2007



Time to get serious

Jon

I've been working with a team lately who've been in the early stages of discussion with a client about a very major opportunity - think ten typical deals added together, then add some.

They're doing all the right things at this stage - building up trust with the client's decision-makers, shaping the requirements in our favour. Their best guess is that this influencing phase has another couple of months to run.

"So let's start talking about the proposal effort," says I.

"But their RFP won't be out for ages yet."

Cue a workshop looking ahead to the proposal phase, involving a core team of senior managers. As I explained it, "At some point we're going to have to get serious about this - and I don't want that to be once the RFP's arrived."

So we're now off identifying and talking to the probable contributors. We're trying to secure war room space. We have experts assessing our likely competitors. We're booking a strategy session, and a stakeholder analysis meeting ("I want everyone who'll evaluate the proposal to be favourably disposed to our cause").

We're working out what content we can pull together before an RFP lands. We're lining up internal stakeholders. We're making sure that we are definitely going to bid - perish the thought that the qualification decision happens so late that we waste resources, or don't secure resources soon enough, or mislead the client.

We're building a plan as to how we'll manage the proposal when the client does press 'go', and making sure everyone understands what will be needed. We're trying to inject a will to win in the whole team.

Will we win? I have no idea yet, although you can bet I'll do everything I can to help the team to do so. And it'll be so much easier if we don't start off on the back foot.

StrategicProposals

Jon and BJ are the principal directors of Strategic Proposals, one of the world's leading proposal management consultancies.

We build proposal centers, support live proposals, and deliver highly-acclaimed training courses. Our clients come from a wide range of industry sectors, worldwide. In 2006, Strategic Proposals was accredited as an Approved Training Organization by the Association of Proposal Management Professionals.

“ The importance of bid and proposal management in driving business performance and customer satisfaction is often under-estimated. Strategic Proposals provides not only an unmatched depth of expertise and understanding in this area, but also bring passion and commitment to how they assist in improving the quality of bid and proposal management in large corporations and promoting the cause and effects across the industry. ”

Strategy Director, Global IT Provider

www.strategicproposals.com

TheProposalGuys

www.theproposalguys.com