

Writing Proposals to Win Business

Brought to You by



SCORE: Nationwide

- ✔ **SBA Resource Partner**
- ✔ **A 501c(3) Organization**
- ✔ **389 Chapters**
- ✔ **11,000 Volunteer Counselors**

SCORE services are provided without regard to race, gender, ethnicity, national origin, age or disability.

SCORE 114: Orange County

A Network of Business
Knowledge and Experience

Your Success

Is Our only Product

Your SCORE OC in 2009

- ✔ **Largest Chapter in the US (>100 members)**
- ✔ **#1 in Total Services Nationally**
- ✔ **Over 8 thousand Counseling Sessions**
- ✔ **Over 9 thousand Workshop Attendees**

**Selected as the
2009 National Chapter of the Year**

Sponsors

SCORE Orange County



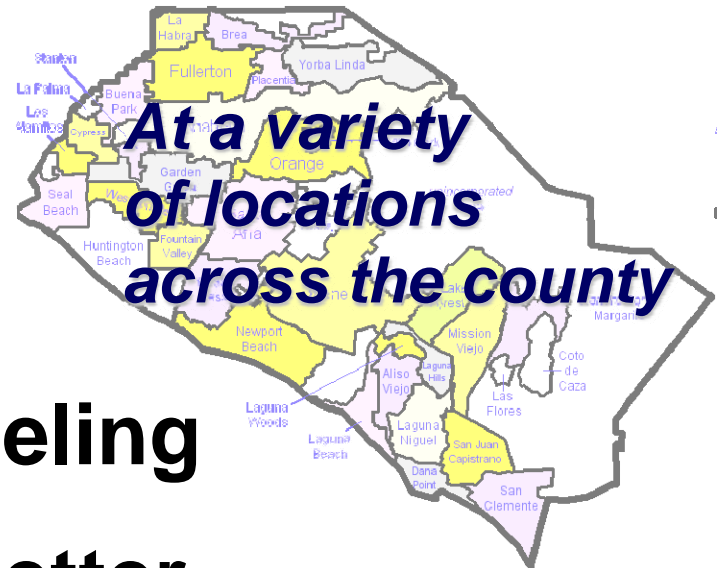
IKEA



www.score114.org

SCORE OC: Delivering to You

- ✔ Face-to-face counseling
- ✔ CEO Forum Groups
- ✔ Workshops
- ✔ Advisory Boards
- ✔ Cyber (online) counseling
- ✔ Monthly Email Newsletter
- ✔ Women in Business Program



Contact SCORE Orange County

To make an appointment
for counseling **(714) 550-7369**

To register for a workshop, or
for more info **www.score114.org**

To 'ask a counselor' online
www.score.org

Housekeeping

 **Restrooms**

 **Breaks**

 **Telephones**

 **Your Feedback**

 **Business CD**

 **Questions**

Up Your Win Rate!

Government Proposals for Small Businesses Your Company Can Win!

Sandra McClintock

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www.mbdolphin.com

SCORE114 Orange County, CA

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\$77B federal money spent with small business in 2009 (20 states)

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“The dinosaurs became extinct because they were large and slow. In business, being small is a great advantage!”

STATE	DOLLARS	PERCENT OF TOTAL
Virginia	\$14,890,590,497	27.18%
California	\$8,472,302,166	15.25%
Maryland	\$7,364,039,138	27.15%
Texas	\$6,776,712,388	21.74%
District of Columbia	\$5,898,912,441	28.99%
Florida	\$4,739,446,281	28.14%
Georgia	\$2,920,479,911	26.90%
Alabama	\$2,838,403,623	25.62%
New York	\$2,581,318,851	20.22%
New Jersey	\$2,571,599,172	26.88%
Pennsylvania	\$2,541,980,379	14.16%
Ohio	\$2,485,646,433	28.94%
Colorado	\$2,123,684,231	23.71%
North Carolina	\$2,087,279,861	38.30%
Massachusetts	\$1,902,358,655	11.73%
Louisiana	\$1,815,728,600	22.48%
Illinois	\$1,790,040,198	17.16%
Alaska	\$1,686,225,399	60.52%
Washington	\$1,661,536,136	14.59%
Missouri	\$1,515,791,321	12.01%

Things You Need to Begin

- Click on this link for information
 - <http://gov.onvia.com>

DO YOU KNOW WHICH
GOVERNMENT AGENCIES BUY
WHAT YOU SELL? **WE DO.**



LEARN ABOUT AGENCY CENTER,
THE NEWEST ADDITION TO THE ONVIA ONLINE DATABASE

GET STARTED →

DUNS #, CAGE Code, CCR

- DUNS #

For details, visit the D&B website at

<http://www.dnb.com>

- CAGE Code

http://www.dlis.dla.mil/cage_welcome.asp

- CCR (Contractors' Central Registry)

<https://www.bpn.gov/ccr/default.aspx>

NAICS Codes

- You can research NAICS codes at
- <http://www.census.gov/epcd/www/naicstab.htm>.
- For additional information about NAICS codes, call the Census Bureau's resident expert on industry classification at (888) 75NAICS.

gBusiness is Big Business

- **Winning in the gBusiness Market**
- Spending by federal, state and local governments now accounts for almost 50% of the U.S. GDP. No matter where you fall on the political spectrum, a new economy has emerged: **gBusiness**, the intersection of business and government, has created a **\$5.5 trillion market**.
- Companies that recognize and incorporate gBusiness into their overall strategy will surpass their competitors in any economic climate.
- **Companies that ignore this opportunity will quickly find themselves at an insurmountable competitive disadvantage.**

Onvia Services

- **RFPs and Bids**
- **Forward Planning**
 - Agency budgets, capital improvement plans
- **Buyers and Decision Makers**
 - Name, Title, Address, Phone #, Email
- **Partners and Competitors**
- **Daily Email packages**
 - \$3,200 for federal and up to 12 states
 - \$18,180 for complete services

Federal Websites for Bid Opportunities

- <http://www.ccr.gov>
 - Register or confirm CCR registration
- fbo.gov
 - Federal government daily bid list
- https://www.navsup.navy.mil/navsup/business_opps
 - US Navy instructions for bidding
- www.dibbs.bsm
 - Defense Logistics Agency bid list

State & Federal Bids

- www.govdirections.com
 - Economic Stimulus Projects
 - Federal Projects (30 days free)
 - State Projects for all 50 states
 - Breakdown by *state & local* and *certified technology* categories
 - Small Cost for complete services

State & Federal Bids

- http://www.bidcontract.com/State_County_City_Bids/government_contracts_bids_California_State_CA.aspx
- www.bidsync.com
To get bid documents, you must be a paid member (from \$379)
- www.governmentbids.com (\$25-\$75/mo)

Sample Bidcontract.com

(State of California)

- ADULT AND CHILDREN'S SERVICES
- 581640 BRASELOW PEDIATRIC RESUSITATION CARTS
- 549908 HARDWARE - NETWORKING APPLIANCE - LAYER 7-
- 265343-AFTERCOOLER/HEAT EXCHANGER (NEW)
- 516869- BRAND SPECIFIC BID-GILDOR DOOR-JOB WALK
- HELLO BUTTONS

City/County Websites

- <http://camisvr.co.la.ca.us/lacobids/>
Register to do business with Los Angeles County
- <http://www.labavn.org/>
contractual opportunities from City of Los Angeles
- <http://www.lawa.org/welcomeLAWA.aspx>
Los Angeles World Airport site with contracting opportunities

More Links

- www.bidnotice.org

Bids of all kinds from all over the country.

\$20-30/mo and free 1-week trial

- www.sbir.gov

Small Business Innovation Research (SBIR)

Dept of Defense site, \$8 Billion in funding each year for early-stage R&D projects at small tech companies

US Government Certifications

- SBA – www.sba.gov
 - Small Disadvantaged Business (SDB) Program
 - 8(a) Program
- Historically Underutilized Bus. Zone (HUBZone) Program
 - <http://eweb1.sba.gov/hubzone/internet/index.cfm>
- GSA Multiple Award Schedules
 - www.gsa.gov

National Certifications

- Northern CA Minority Supplier Development Council (NCMSDC)
 - www.ncmsdc.org
- California Disabled Veteran Business Alliance (CADVBe)
 - www.cadvbe.org
- Women's Business Enterprise National Council
 - www.wbenc.org

State of CA Certifications

- Dept of General Services DVBE & Small Business Certification
<http://www.pd.dgs.ca.gov/dbve/aboutcerts.htm>
- CA Unified Certification Program (CUCP)
http://www.caltrans.ca.gov/hq/bep/business_for_ms.htm
- CA Public Utilities Commission (CPUC)
www.thesupplierclearinghouse.com
- CA Multiple Award Schedules (CMAS)
www.pd.dgs.ca.gov/cmas/default.htm

Small Business Certification

- Infinity Business Solutions
- Lily Otieno - 714-670-8941
- lotieno@ibsusaonline.com
- www.ibsusaonline.com
 - Small business certifications
 - DBA's/biz plans/ incorporations

Opportunities Abound!

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**“Opportunity paged me, beeped me, linked me,
e-mailed me, faxed me, and spammed me.
But I was expecting it to knock!”**

Connect the Sales Process to the Proposal Process

- Choose the public agency or entity you want to do business with
- Find out all about them: needs, wants, funding, future plans, upcoming RFPs
- Make a sales call on them and get on their list for receiving RFPs
- Nothing beats face time!
- During the proposal process, you may not contact the client individually

Know Your Competition!

- List all known competitors
- Calculate their strengths/weaknesses
- Evaluate how you measure up
- Any deficiencies compared to theirs?
- Can you address (ghost) this in your proposal and mitigate it?
- Identify potential teaming partners.

Teaming is Great for Small Businesses

- Large firms mandated to use 5-25% Small Business Enterprises (SBEs)
 - Woman-owned qualifies for federal offsets
- Have difficulty filling quotas
- WBE/DVBE opportunities
www.fccicorp.com 310.674.7452 or
www.ibsusaonline.com 714-670-8941

Check Out Potential Biz Ops from Contract Winners

- <http://www.defense.gov> (news/contracts)
- This site has daily winners for \$5M or more contracts
- Sep 1: Clark/McCarthy, Costa Mesa was awarded a \$394M FFP Navy contract for design/construction of hospital/parking at MCAS Camp Pendleton. 2014 completion.

Get Your Ducks in a Row At or Before RFP Release

Here's your boilerplate for reuse

- Related Company Experience
 - Survey clients to ensure favorable references
- Identify possible risks
 - Define your approach to avoid or mitigate

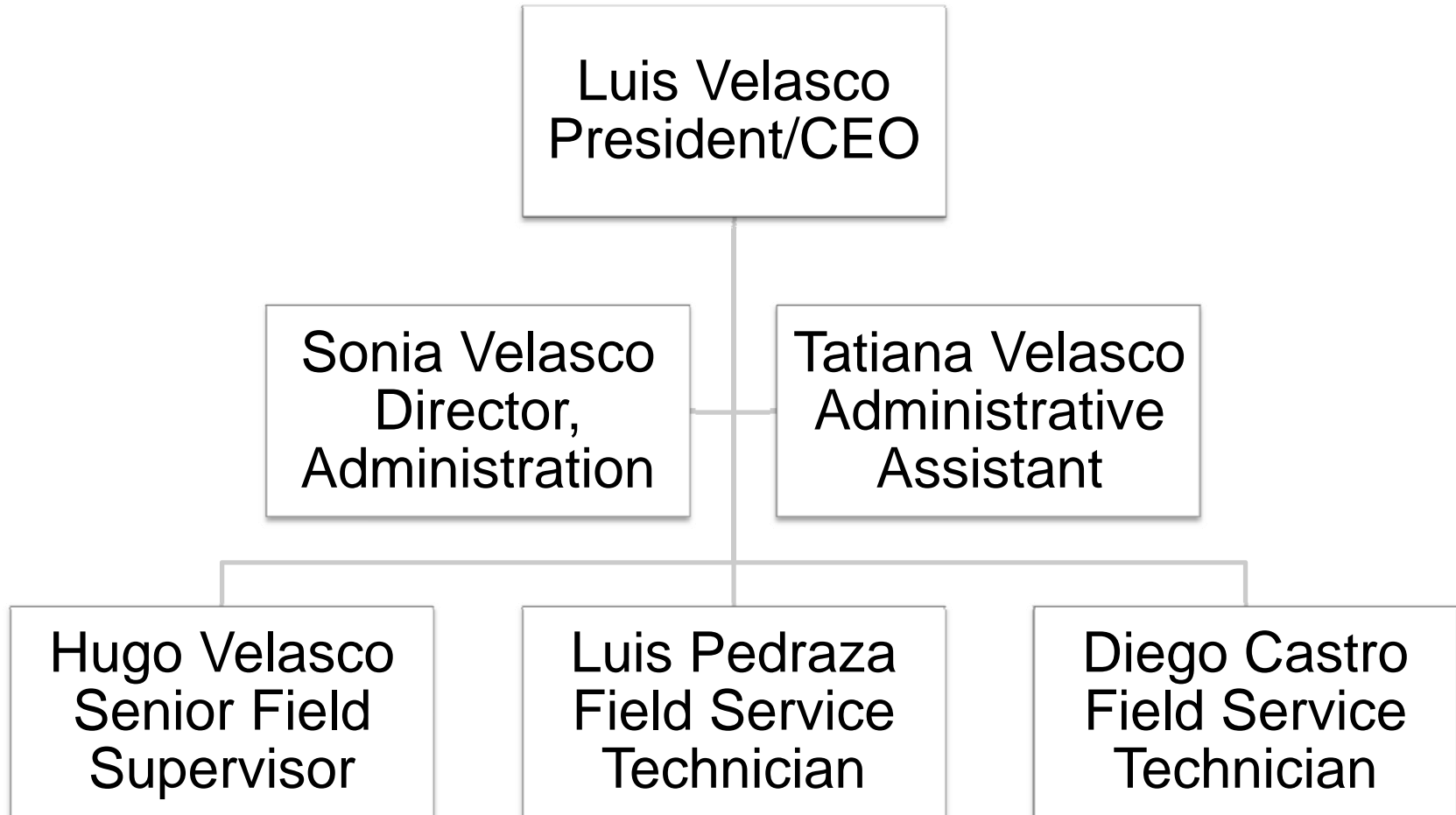
Get Your Ducks in a Row

GRAPHICS

- Key processes (supply chain), structures
- Diagrams
- Organization charts
- Company promotional material
- Data sheets
- Company Photos

Velasco Air Inc.

Organization Chart



Bid/No-Bid Decision

- Pull all company assets/liabilities together
- Evaluate feasibility of winning
- Evaluate financial impact of winning
- Make a bid/no-bid decision based on this
- Make a prime/subcontractor decision
- Read between the lines in the RFP
- Most important step in the process!

What Does This Tell You?

Item from a U. of Oregon IT RFQ

- 9. A detailed cost proposal, including any travel costs and other expenses. As ECS may award a contract based on the initial offer, a bidder should make its initial offer on the most favorable terms available. **ECS reserves the right, however, to have discussions with those bidders falling within a competitive range, and to request revised pricing offers from them and to make an award or conduct negotiations thereafter.**

The Proposal Process

- Distribute RFP and assign sections
 - Technical, Management, Cost/Pricing
- Have a kickoff meeting to discuss:
 - Your solution;
 - Team assignments and deadlines;
 - Storyboarding, graphics, formatting, iteration control;
 - Editing and reviews, final production

The Small Team

Assign Duties & Deadlines

- Project Mgr: CEO, overall accountability
- Proposal Mgr: Employee or consultant
- Authors/SMEs: Staff or consultant
- Cost: Your CFO or Accountant
- Contracts: Your Attorney
- Editor: Employee or consultant
- Desktop Publisher: Employee or consultant
- Reviewer: CEO, consultant

RFP Sections

Federal Format

**Section A - Solicitation/
Contract Form**

Section B – Supplies/Services

**Section C - Description
and Specifications (SOW)**

**Section D - Packaging and
Marking**

**Section E - Inspection and
Acceptance**

**Section F - Deliveries or
Performance**

**Section G - Contract
Administration Data**

**Section H - Special Contract
Requirements**

Section I - Contract Clauses

**Section J - List of Documents,
Exhibits and Attachments**

**Section K - Representations,
Certifications**

**Section L - Instructions,
Conditions and Bidder
Notices**

**Section M - Evaluation
factors**

RFP Sections

Sample CA State Format

- 1 Purpose, Background, and Term
- 2 Schedule of Events
- 3 RFP Instructions, Solicitation Provisions, and Bidder's Certification
- 4 Scope of Services, Work, Deliverables
- 5 Bidder Requirements, RFP Submittals
- 6 Evaluation and Selection Criteria
- 7 Proposal Instructions, Content, Format

Story Boards

Outline and Marketing Guide

- Create detailed outline for your response
- Develop win themes with this in mind
 - Our company is #1 in service 😏
 - We can save you 5-10% in service costs 🙌
- List solution, features, benefits to client
- Choose graphics to tell story
- Winning proposals are about the client
- Follow every “we” with a “you”

Storyboard Sample

Volume:	Writer:	Date Due:
Section:		Subsection:
Section Title:		
Win Theme:		
Total Pages:	Importance of Section to Capturing Contract:	File Name: Volume #: Section Name:
Tables/Art Notes/Sketches:		
Benefit Statement:		
Lead Paragraph:		
Supporting Paragraphs:		

Start Writing!

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GLASBERGEN

**“Every detail of the proposal must be perfect!
Get Davidson to write the vowels, Mulroy to write the
consonants, Schwartz to write the punctuation and
Lewis to put the spaces between the words.”**

Configuration Management

- Avoid the hydra-headed monster!



- Have a process to accommodate:
 - Requirement changes
 - Team changes
 - Iteration control
 - MS Word Versions (2003/2007/2010)

Iteration Control

- Authors must work with latest file versions
- Adopt a uniform file protocol
 - Volume, section, author, date, time
 - File Access
 - Separate drive accessed with permission
 - Document every change
 - Hardcopy markups or use change tracking
- Balance tracking and expediting

Software vs. Human Control

- 1 Central Person as Copy Gatekeeper
 - Authors/editors check out copy from him/her
- Software (can be purchased or created)
 - Copy checked out from software program
- Either works if everyone complies
- Beware the errant author that uses his/her own files and substitutes for edited copy!
This can sink proposals close to deadline.

Proposal Sections

- Cover
- Transmittal Letter
- Title Page
- Table of Contents
- Executive Summary
- Technical Volume
- Management Volume
- Price Proposal
- Attachments/Appendixes

Your Solution

Create summary of RFP requirements

Create outline and insert your story

Plug in win themes

Distinguish features vs. benefits

Create compliance matrix

--Can you meet all of them?

--Retain RFP order for compliance

--Client needs, wants

--Use the “so what” test to tell the difference

--Fool proof your offering

Executive Summary

- Document for decision makers—your chance to shine!
- **Who, What, Where, When** corporate support/dedicated personnel, solution overview, place(s) of work, schedule/milestones
- **How** it will benefit the client
- **Why** they should choose you

Technical Volume

- Intro: Your take on client's current situation and goals they want to accomplish
- Solution: (Statement of Work) answered
- Products: List, configuration & delivery info
- Services: List, where, when, how, why
- Implementation: Timeframe, client tasks, downtime during process
- Comfort: Success doing this in the past

Management Volume

Project Organization

Corporate Support

Subcontracting Plan

Staffing Plan (Resumes)

Project Planning/Schedule

Risk Management

Customer Involvement

QA & Security

Performance Metrics

SLAs (Service Level Agreements)

Supply Chains

Safety Plan

Training Program

Capacity Planning

Continuity Planning

Customer Support

Contract Deliverables

Transition Plan

Corporate Experience

Pricing Proposal

Where the Rubber Meets the Road

- Pricing alone may not win a bid, but it can lose it!
- High Bidder: Justify cost with value & low risk
- Low Bidder: Less fat, quicker, more responsive
- Middle of the Road: Lowest cost w/o risk
- Price multiple solutions
- Know what your solution means to client's bottom line
- Do this section last

Resume Sample

Figure XX. Senior Network Engineer, John Doe



DoD: *Designed 99.999% available architecture for AKO/DKO currently supporting 2.5M+ users*
Designed physical security systems for Green Zone, Camp Victory and FOBs throughout CENCOM
Led system engineering for GCSS-Army (F/T) for Army logistics upgrade
 PATENTS: *Enterprise Process Management, SNMP Firewall*
 API's: *Product Line JCR, JAVA, C++, JXTA, SNMP, various sensor APIs*

Name	Contract Labor Category/Contractor's Labor Category	Percent of time allocated to this effort
John Doe	Senior Network Engineer	100%

Security Clearance	Current work location	Planned work location upon contract award	Number of years/months experience for each contract labor category
Secret	Carson, CA	Carson, CA	8 years / 6 months

Work Experience

Expertise	Employer/ Responsibilities/tasks
Tactical Internet Environment Systems	Northrop Grumman, Chief/Senior System Engineer, Multiple Programs (01/03-Present) <i>ISYSKOM4: Technical management and development for 40+ engineers on team to deliver system management, initialization products, and data products for Tactical Internet and FBCB2</i>

Sample Compliance Matrix

RFP Requirement, Section and Page No.	Corresponding Proposal Section and Page No.
Service Level Agreement Section C, Page C-19	Technical Volume, Section C-1.3.4, Page 129
Major Reviews Section C, Page C-84	Management Volume, Section D-3, Page 161
Metrics Reporting Section C, Page C-93	Management Volume, Section D-5, Page 165

Performance/Personnel Matrix

Tasks to be Accomplished	Personnel Responsible
System and software engineering documentation	Tom Jones
System Subsystem Specification (SSS)	Alexis Smith
Interface Control Document (ICD)	Georgia Adams
Requirement Traceability Matrix (RTM)	Brent Fagen
Software Product Specification (SPS)	Ed Morris
Software Development Plan (SDP)	Don Leaf
Software Product Specification (SPS)	Susan Lafferty

Sample Past Performance

- COMPANY: Salamander Productions, Van Nuys, CA
- PROJECT: New Generation of Remote Control Cameras
- Successfully developed architecture for a new generation of remote control cameras for aerial cinematography. System uses Inertia Measurement Unit, accelerometers, and GPS to achieve movement stabilization. The software controls up to eight movement axes on a camera with record/playback capability on all axes. System allows toe “stretched” and “compressed” playbacks. Real-time section performance is achieved by using 1-ms hardware interrupt.
- CONTACT: Mehran Smith
- PHONE: 818.777.277 / msmith@salamander.com

What Not to Do

- **Your Marketing Opportunity**
- XYZ Design and Communications is a full-service local advertising agency that **understand** your market and has the flexibility to adapt in working with various XYZ **Departments** and programs. The first step in the process is developing a strong action-oriented marketing plan. Once we have **an agreed upon**, we will create a unique, customized marketing **vehicles** for the College.
- **XYZ Communications** brings over 10 years of experience in research/planning, brand development and all facets of marketing execution. We have the qualifications to assist **your business** in creating a strong brand that will meet your goals.

What Not to Do

- Avoid institutional regurgitation!
- Fluff, Guff, Geek, Weasel
 - Fluff: unsubstantiated grandiose claims, vague generalities, cliches
 - Guff: Long sentences, big words, passive voice, lacks transparency
 - Geek: Jargon, acronyms, minute tech details
 - Weasel: could be, might, helps, subjunctive case (“we would like to” instead of “we will”)

FLUFF

- Grandiose claims
- Vague generalities
- Unsubstantiated claims
- Filler to make your document more pages

Fluff Example

- Our offering is a best-of-breed , world-class solution.
- Our company employs leading-edge solutions and state-of-the-art products.
- We are Number 1 is service.

GUFF

- Choke-a-horse style
- Long sentences, too many big words
- Obtuse, abstract words and average sentence length of 30 words
- Sentences should average no more than 15-17 words.
- Long sentences and drugs have the same effect on the reader's brain!

GUFF EXAMPLE

- To effectively manage disaster recovery, the Disaster Recovery Plan clearly defines the critical equipment, software, and functions, as well as the Disaster Recovery operation procedures, defining the solution(s) for backup processing or relocation to alternative worksites as appropriate, for systems deployed in the project.

GEEK

- Disregard for your audience
- Overuse of jargon & acronyms
- Focus on technical details instead of functions or differentiators
- Use language clients can understand without an acronym guide
- Ask your mother or aunt if they understand it.

GEEK EXAMPLE

- Tier 1 will consist of Enterprise SNLANs between each County Agency Headquarters location and the County OCTNET Core backbone network over County fiber, carrier provisioned and gigabit circuits that currently exist for connectivity.

WEASEL

- Words like “can be, might, helps, could, may be, enable, allow, up to, like, virtually.
- Subjunctive case: We would like to thank you ... It should be possible to achieve ... We believe our solution is effective, based on the information we have at this time.”

APS = GOOD TEXT FORMULA

Organize your text effectively to highlight value and competence:

- Acknowledge**
- Persuade**
- Substantiate**

Acknowledge

- Yes, you are smart to see that this is an important issue.
Example: “You indicated that one of your most important needs is to reduce operating costs.”

Persuade

- In fact, it's so important that we did something special about it. Example: "As a result, we have included, as a component of our solution, a strategy for reducing your energy consumption by 15% to 18%."

Substantiate

This is how we'll do it:

- “We will install Brand A low-voltage lighting in all of your facilities. Brand A lighting is guaranteed to reduce energy consumption by 18 percent.”

Exercise

- **Request for Proposal Cover Sheet & Signature Page**
 - The *Request for Proposal Cover Sheet & Signature Page* must be completed, signed and returned with the vendor response. This page must include all requested information. This includes but is not limited to the F.E.I.N. of the offeror responding, the full legal name and business address of the bidder and the signature of a person authorized to contractually bind the offeror. Label the *Request for Proposal Cover Sheet & Signature Page* as “Tab 1 – Request for Proposal Cover Sheet & Signature Page.”
- **Cover Letter**
 - The cover letter must include the full legal name and business address of the supplier, as well as the signature of a person authorized to contractually bind the supplier. The cover letter should also state acceptance of the terms and conditions in **Exhibits A1 – A4 and Exhibit B**. Label the Cover Letter as “Tab 2 – Cover Letter.”

FEIN – Federal Employee Identification Number ELECT AN ENTITY TYPE BELOW FOR A FAST AND EASY 5 MINUTE ASSISTED FILING SYSTEM

- Sole Proprietor or Individual
- Partnership
- Limited Liability Corporation (LLC)
- Corporation
- S-Corporation
- Personal Service Corporation
- Church Controlled Organization
- Other Non-profit
- Trust
- Estate of a deceased individual

Walk Through

- Cover Letter
- Exhibit G – Company Fact Sheet
- Exhibit H – Company Experience and Demonstrated Capability Fact Sheet
- Exhibit I – Risk Assessment Plan
- Value Added Options or Differentials
- Cover Styles, Simple & Embellished

Proposal Management Review

- Conduct bid/no bid meeting
- Prepare for kickoff meeting
- Conduct kickoff meeting
- Present storyboards
- Write first draft
- Create instruction for reviewers
- Conduct Red Team review

Proposal Mgmt Review (cont)

- Consolidate review comments
- Present review to team
- Proposal team revises first draft
- Review revised draft
- Final draft presented to CEO
- Master copy sent to production
- QC each copy sent to client
- Deliver proposal to client (CRITICAL)

Up Your Win Rate!

- Sell the client before RFP release
- Make good bid/no-bid decisions to reduce number of losing proposals
- Know your competitors
- Follow established proposal process
- Don't deviate from RFP requirements
- Write from client viewpoint
- Use professional writers and editors

Up Your Win Rate!

- Help technical experts tell their story
- Help client decision makers understand technical content
- Address risk to satisfy decision makers
- Pay attention to details
- Remember: proposal evaluation is a process of elimination

Up Your Win Rate!

- Check out a GSA Schedule
 - Unfunded, 5-year contract listing prices the federal government has agreed to pay for commercial products and services
 - Can be costly to obtain; increasing your prices is restricted; canceled if under \$25K in sales during first 2 years
 - See Federal Acquisition Regulation Subpart 8.4
<http://www.arnet.gov/far/farqueryframe.html>

Post Mortem

- Win or Lose, analyze why!
- Keep good records
- Store “boiler plate” for reuse
- Learn what worked and what didn't
- Reward proposal team
- Meet outside of work for just plain fun!
- Avoid burnout

Contingency Planning (If All Else Fails)

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“Remember son, if at first you don’t succeed, assemble a team of lawyers to shield all involved, convince your investors that failure is an essential component of success, create a network for spin control to trivialize any negative consequences, and try, try again.”