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## MANAGE THE PROJECT

### Learning Objective

- Know how and when to create and use documents, online repositories, and software that are critical to effective management of the proposal process.

### Introduction

In the first chapter of this book, you learned that the sales process should be closely connected to the proposal process. In many ways, your customers should already be sold, long before they read your proposal. The second chapter presented an overview of the proposal process from start to finish. The third chapter provided detail regarding responsibilities of the proposal team. Chapters 5, 6 and 7 presented specific “how-to’s” for breaking down the RFP to identify its critical elements, creating win themes, creating a content outline, creating storyboards and writing the Executive Summary.

In this chapter, we concentrate on managing all of these elements.

### Overview of Documents, Online Repositories and Software that are Critical to Managing the Proposal Process

- Proposal process summary
- RFP summary of requirements
- Compliance matrix
- Database of personnel resumes
- Database of proposals submitted
- Database of completed projects
- Database of client information
- Database of your company history and accomplishments
- Database of your product and services descriptions, features and benefits
- Software for creating your project schedule
- Template for storyboards
- Template for consolidating the Red Team comments