

# Getting Strategy Into the Proposal

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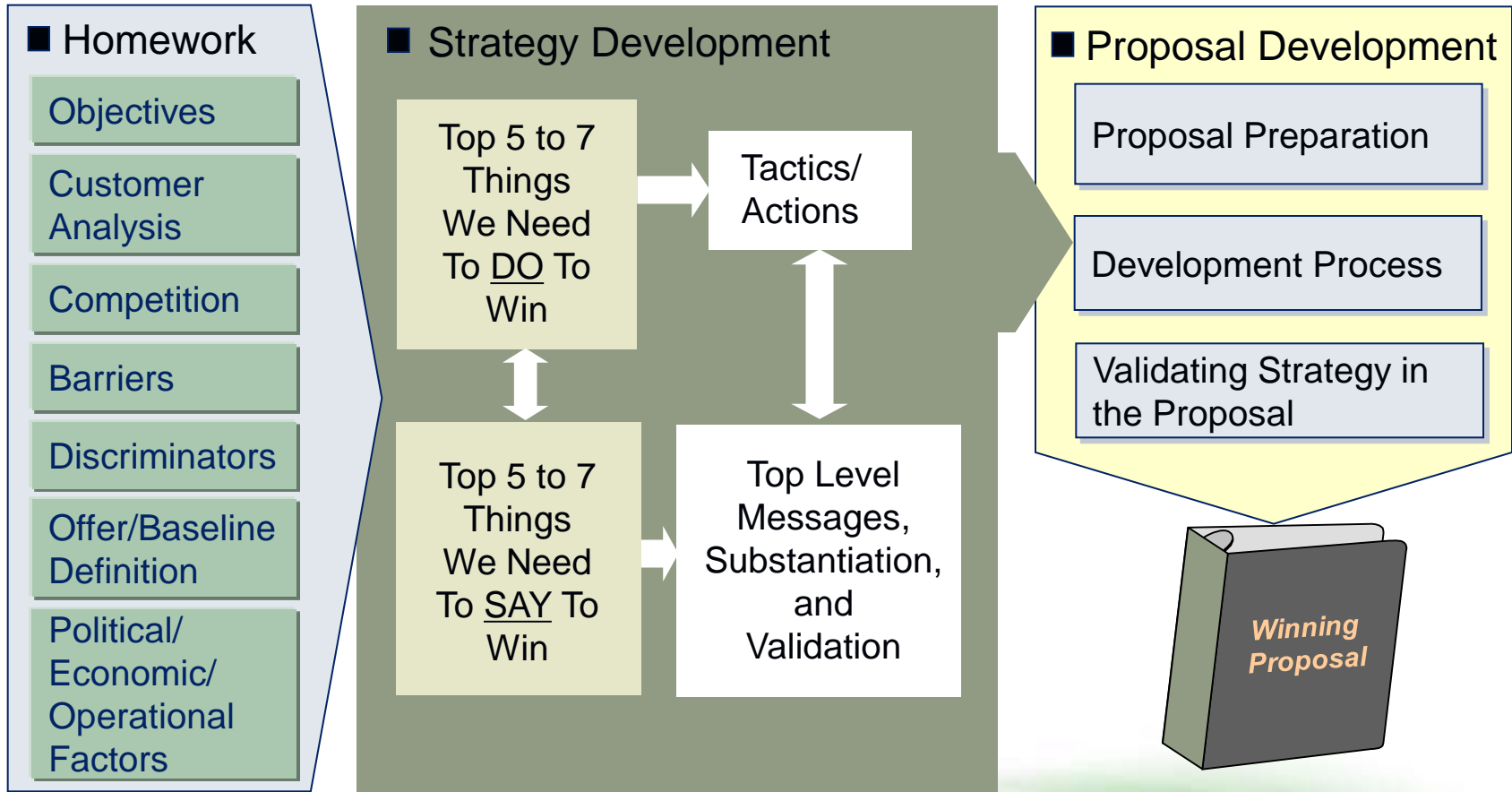
SM&A



# Overview / Outline

- The Process of Getting Strategy into the Proposal
- The Homework
- Developing the Strategy
- Getting Strategy into the Proposal
- Validating that the Strategy is in the Proposal

# Strategy & Proposal Integrated Process



# Top Level Company Objectives

- What are your company's objectives as they relate to this procurement?
- Why is it important to your company? What does it mean for the company?
- Why is it important to your company's employees? What does it mean for the employees?



*Is What You Are Doing Worth The Pain?*

# Customer Analysis

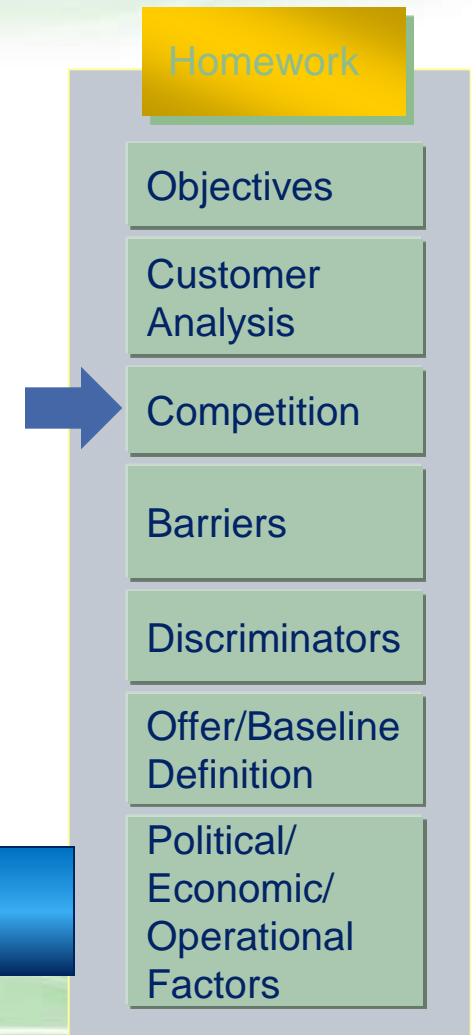
- Identify the customer(s)
- Understanding of customer desires
- Understanding of customer concerns



*Understanding The Customer Is THE Key To Business Development*

# Competition

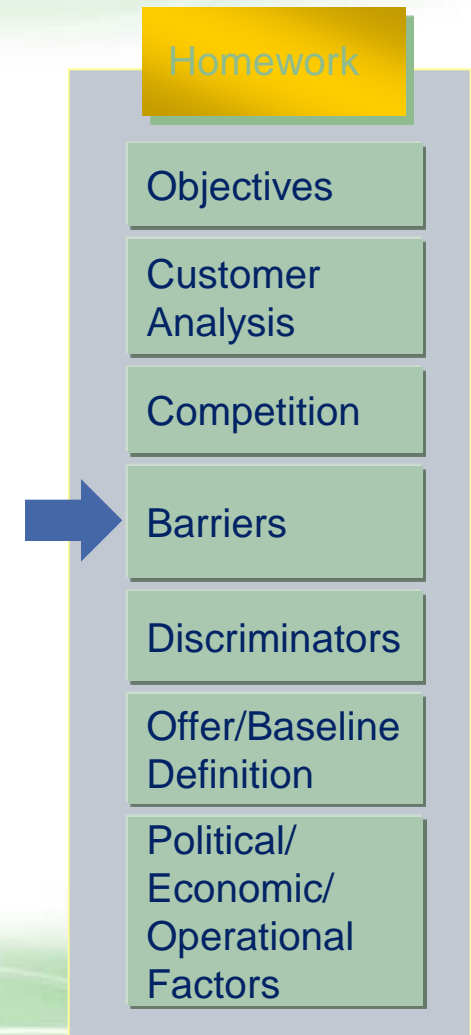
- Who are your main competitors?
- How likely is it that a previously unknown be a contender?
- What is their likely strategy?



*Understanding the competition is key to your positioning strategy*

# Barriers

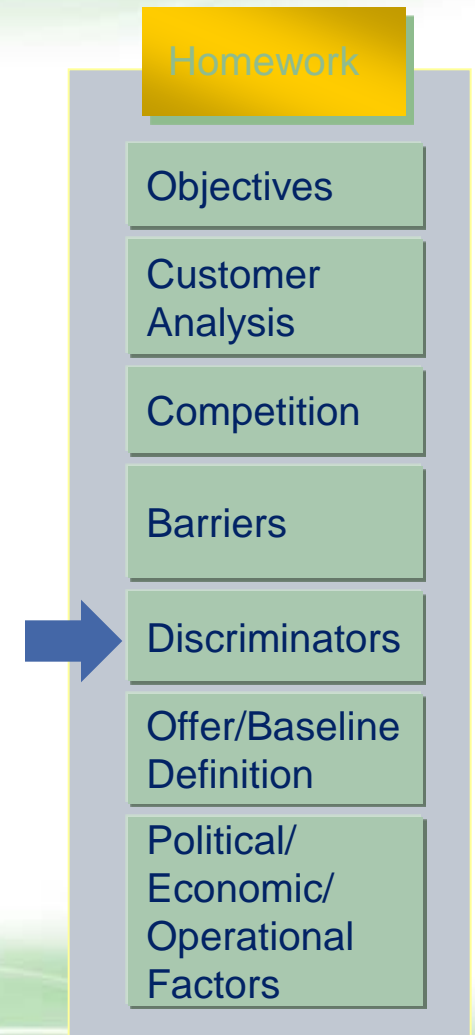
- What internal barriers must you overcome?
- What external barriers must you overcome?
- What personal barriers must you address?





# Discriminators

- What is a Discriminator?
  - Something that only you have, ***and***
  - Something that is of value to the customer
- How many discriminators do you really have and how strong are they?
- Do you have any weaknesses in the form of negative discriminator?





# Offer / Baselines

- Top Level Offering (Conceptual, what we are selling)
- Mid-Level Baselines (SOW-Level)
- Detailed Baselines (Fully Integrated)

Homework

Objectives

Customer Analysis

Competition

Barriers

Discriminators

Offer/Baseline Definition

Political/  
Economic/  
Operational  
Factors

*Team Needs To Understand and Consistently Present Our Offer*

# Political / Economic Factors

- The Federal Procurement Environment
- Macro & Micro Political Environments
- Macro & Micro Economic Environments

*Understand the macro & micro forces that affect your proposal*

Homework

Objectives

Customer  
Analysis

Competition

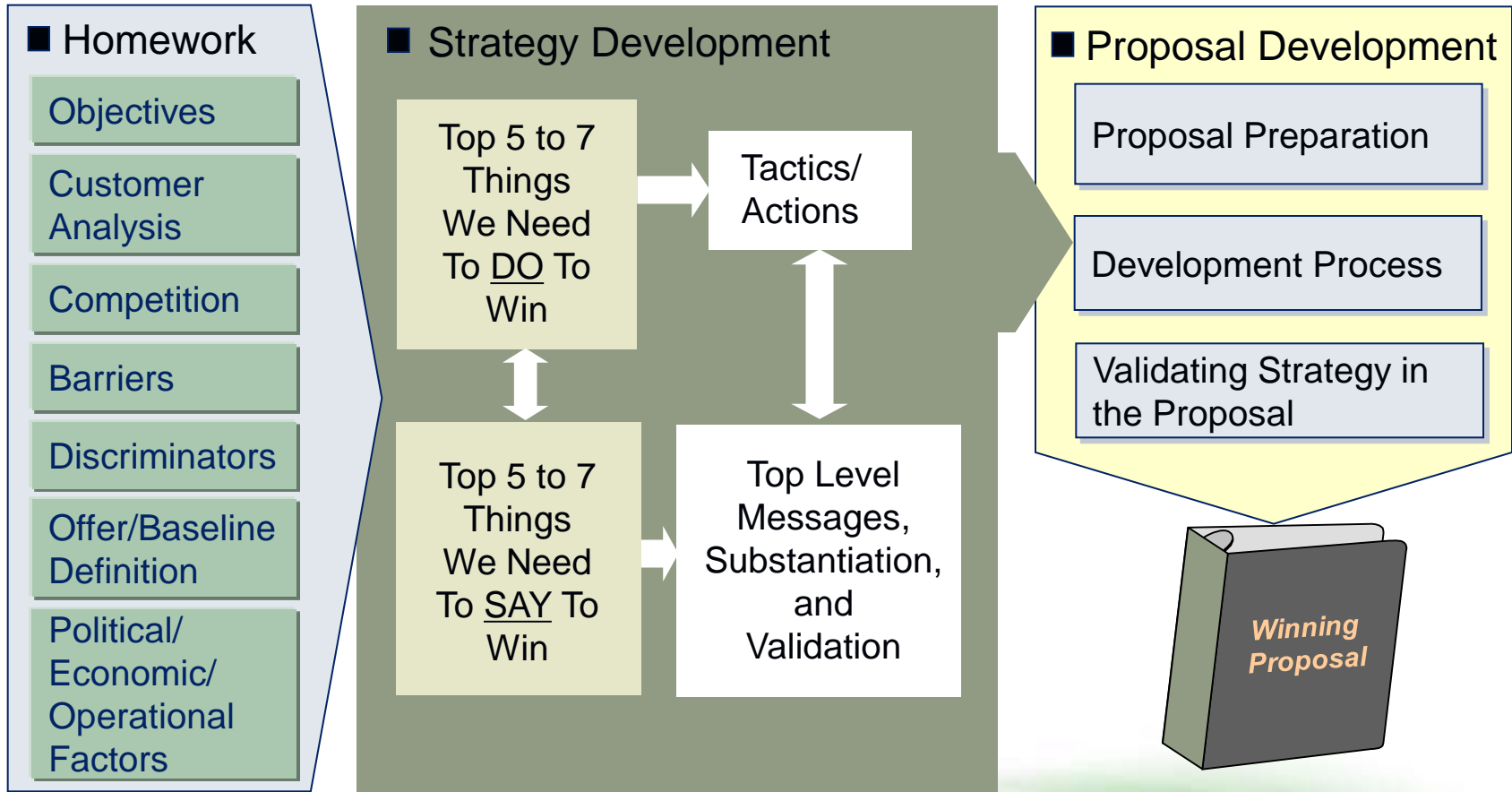
Barriers

Discriminators

Offer/Baseline  
Definition

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# Strategy & Proposal Integrated Process



# What is the Proposal Strategy?

- *The documentation (and internalization or ownership) of the conditions that need to be in place to win and the associated actions to create those conditions*
- *Typically 5 to 7 key overarching things you need to **DO**, and therefore, 5 to 7 key overarching things you need to be able to **SAY** in the proposal to win*

# Why is it Important?

- **Win Strategy identifies the elements that if taken together and acted upon create the winning “end state”**
- **Win Strategy directs resource allocation and assigns accountability to address the customer’s specific issues and needs.**
- **Creates the winning discriminators — mitigates barriers and losing discriminators**
- **Drives the proposal process**
  - *Creates the basis for team formation*
  - *Prioritizes team effort*
  - *Determines investment plan*
  - *Reduces non-value-added work*
- **Influences what Customer wants. Redefines what wins.**
- **Changes evaluation priorities away from competitors’ strengths. Ghosts the Competitor**

*Win Strategy is not the selling of what we have or only what we can currently offer - but what SHOULD BE to solve the customer’s problem*

# The 4 to 7 Things You Must Do to Win

- We Will Win When We...
  - *Develop...*
  - *Invest in...*
  - *Substantiate...*
  - *Shape the acquisition to...*
  - *Prove...*
  - *Demonstrate...*
  - *Ensure...*
  - *Create...*



*If we Do These Things And Create This Environment We Will WIN*

# What Strategy is Not?

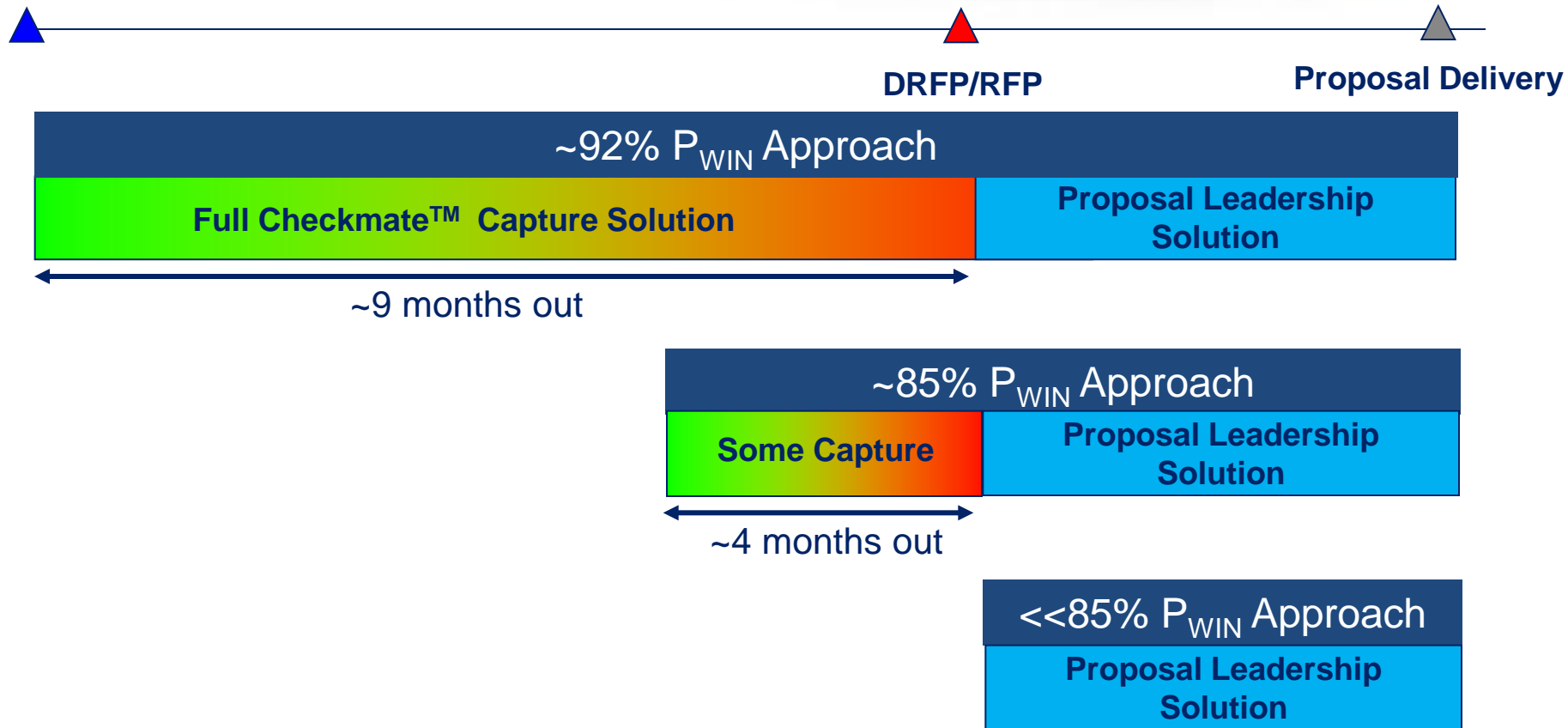
- Win Themes
- Baselines
- Customer Values
- Features or Benefits
- Differentiators
- Compliance Approach



# The relationship between strategy and the proposal

- A well established and executed strategy ***positions*** for the win
- A well written (winning) proposal ***clearly conveys why this strategy is the best option for selection***

# Effective Strategy Execution from Capture through Proposal (\$100M Class Procurements)



*Starting point determines your ability to impact  $P_{WIN}$*

# Win Strategy vs. Spin Strategy

- Win Strategy: Documentation of the conditions that need to be in place to win and the associated actions to create those conditions.
- Spin Strategy: Highlighting the best of what you have within the proposal.

# 12 Rules of Successful Business Capture



1. Understand your customer
2. Strategy drives all aspects of pursuit and capture
3. It is the Capture Manager's job to convert the organizational objectives of the company into a high value added product offering to the customer
4. Develop a focused contact plan and implement it early
5. Messages from all elements of the company and team must be coordinated and consistent
6. Every product is a proposal – Treat them as such

# 12 Rules of Successful Business Capture

7. The proposal may not win the competition on its own, but it certainly can lose it
8. Obtaining management commitment is critical to pursuit and capture success
9. Reconcile issues prior to proposal submittal
10. Understand the customer's rules of engagement
11. Management reviews consume time and if not properly planned for result in schedule and morale problems
12. If you're not serious about winning – No Bid

# Inserting Strategy through a Rigorous Process

Pursuit Decision

DRFP

RFP

Submission

Sources Sought/Industry Notice

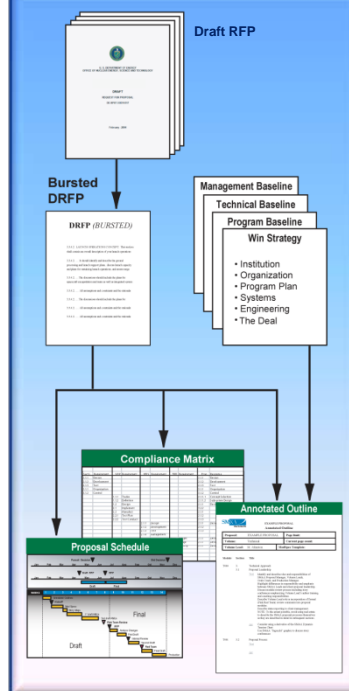
## CAPTURE PREPARES THE WAY

- Customer intelligence
- Competitive intelligence & analysis
- Price-to-win
- Offering design
- Past Performance selection
- Strategy synthesis
- Baselines development
- Shape the acquisition

## PROPOSAL PLANNING



## PROPOSAL MANAGEMENT & CORE TEAM PREPARE THE WAY



## PROPOSAL DEVELOPMENT AND PRODUCTION



## ORALS



## POST SUBMITTAL



***ONCE POSITIONED, a rigorous process will insert strategy into your proposal***

# Validating Strategy in the Proposal

1. ***Compliant & Easy to Evaluate Structure***
2. ***Compliant Response***
3. ***Focus on Benefits***
4. ***Solid Key Graphics***
5. ***Win Themes***
6. ***Buyer Values***
7. ***Substantiation***
8. ***Differentiators***
9. ***Ghosting***
10. ***Correct, Consistent, Concise, and Clear Writing***



# Questions?



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