Looking Back...
and Peeking into the Future

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Ten Years Ago...

The proposal writing profession was significantly different…
Now...

The changes are enormous...

Enough to fill a book!
Some of the Changes...

- Focus on rhetoric
- Use of boilerplate
- Proposal organizations = silos
- Paper-based deliverables
- Physical proximity
- Government-driven industry
- Word processing

- Foundation in psychology
- Personalization
- Integration into sales, business capture
- Digital media and new delivery vehicles
- Virtual teams
- Dramatic rise of commercial proposals
- The Web
Rhetoric vs. Research

Rhetoric
- Focus on writing style, format, layout issues
- MAP, STOP
- Strong process orientation—proposal writing as project management

Research
- Best Practices study
- Win/Loss analyses
- Performance metrics
- Decision heuristics
Recent Research in Decision Making

*Simple Heuristics That Make Us Smart*

Gerd Gigerenzer, Peter M. Todd, and the Research Group from the Center for Adaptive Behavior and Cognition

Oxford University Press
2000

Summarizes research undertaken at the Max Planck Institute for Human Development (Berlin); Max Planck Institute for Psychological Research (Munich); University of Chicago.
Relevance for Proposal Writing

• Understanding how people gather and process information can help us organize a proposal.

• Understanding how people make decisions can help us structure our message for maximum effectiveness.

• Gaining insight into which heuristics a customer is using can help us select and prioritize our content.
Seven Heuristics of Choice

1. The recognition heuristic
   - Recognition is assumed to be a positive value

2. The minimalist heuristic
   - Use any criterion and select the first object it fits

3. "Use the last"
   - Use the last criterion that worked when making a similar decision

4. "Take the best"
   - Use the criterion that has produced the best results in previous circumstances
Seven Heuristics of Choice

5. Estimation heuristic
   - Estimate the probable rate of return and choose the option giving the best ROI

6. Categorize by elimination
   - Compare objects to a set of characteristics, moving through increasingly specific sets until there are none left

7. “Satisficing”
   - Establish a standard of “desirability” and choose the first option that exceeds that standard
Boilerplate vs. Customized Content

The eCommerce revolution:
- Mass customization
- Collaborative filtering
- Directly addressing the customer
Proposal Operations...in a silo?

Ten years ago...

Proposal operations tended to be in a “silo”—

And somewhat isolated from business development/business capture processes
Now the ideal in an integrated operation

- **Sales/Business Capture**
  - Sales provides account specific insight

- **Marketing**
  - Marketing provides differentiators, competitive info, themes

**Proposal Operations**

**A Winning Message**

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Proposal development and preparation
- Biggest potential for eliminating significant number of non-value adding steps:
  - Master document files
  - Passing documents back and forth
  - Incremental builds

Proposal deliverables
- May include digital components (video, audio)
- May include Web conferencing for orals
- May be delivered over the Web, no hard copy
Typical Work Flow circa 1993

Opportunity Qualification (2) → Sales Presentation (3) → Request Proposal Center Support (4)

Analyze Opportunity (5) → Complex Requirements? (6)

Y: Level of Effort Analysis (7) → Identify Risk Elements (8) → Assign Proposal Team (11)

N: Negotiate and Close (20) → Customer Follow Up (22) → Win/Loss Survey (23)

Win/Loss Feedback (25) → Lifecycle Processes (26)

High: Identify Risk Elements (8) → Assign Proposal Team (11)

Low: Custom Content and Pricing (13) → Assemble First Draft (14)

Content Management (15) → Executive Approvals (17)

Final Draft (16) → Print / Bind / Ship (18)

Negotiation Support (21) → Pending Deal Management (24)

Risk Management (10) → Content Maintenance (19)
Constraints of the old process

- Currently takes 25 steps
- Difficult to work as a team
- Most tasks are manual other than search/retrieval of possible answers
- Hard to track assignments
- Formatting challenges
- Multiple builds of the document necessary for review and editing
- No workflow, project overview components
Proposal Workflow after Automation circa 2003

Manual process

Automated process

Assign:
- Project Owner
- Due Date
- Links to CRM system

1. Lead Generation
2. Opportunity Qualification
3. Request Proposal Center Support
4. Set Up Project
5. Electronic? If not, scan
6. “Burst” RFP
7. Automatically Search Database
8. Assign Virtual Team
9. Create New Answers
10. Submit to DB Administrator
11. Accept Answers
12. On-Line/Real Time Editing if Needed
13. Build Compliance Matrix
14. Build Document
15. Print and Publish
16. Deliver to Sales Rep
17. Deliver to Customer
18. Win/Loss Analysis

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Virtual Proposal Teams

Intranet Database Server:
• Database storage
• Selection storage
• Database transactions

Web Server:
• ProposalMaster executable program(s)
• Dynamic HTML form construction
• Search engine for RFPs
• System administration
• Linkage to e-mail server

Web or Network-Accessible Printer

Proposal Team Member

Dedicated Printer

Subject Matter Expert
• Browser
• Word processor

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What’s Next?

**Platform extensions**
1. Wireless applications
2. Product configuration
3. Information storage and sharing
4. Smart prompts
5. Content configuration

**Information management**
6. Advanced search/retrieval algorithms
7. N-tiered data stores
8. Document configuration

**Analytics**
9. Qualification of opportunity—bid/no bid
10. Collaborative filtering
14. Performance metrics
15. Workload monitoring
16. Impact tracking
What about you?

- Innovations you would like to see
- Technologies that seem promising
- Application extensions you’d welcome
Finally...

Happy holidays, everyone!

And thanks for inviting me.