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|  | **How To Write Winning** **Contract Proposals****April 1, 2015** | **198-2015-05** |

**As most of my readers know, I’m currently working part-time for a company called DS Information Systems (DSIS) and my primary job is writing contract proposals. DSIS has been in business for over 14 years and has (and has had) several contracts with the government all on military posts (Air Force, Navy, Army, and Marines). These contracts are mostly here in Hawaii but DSIS does have/had contracts in Nevada (Nellis AFB), California (Port Hueneme), Texas (Laughlin AFB), Washington DC (Office of the Surgeon General) and Alabama (Fort Rucker). My job is in Business Development and my objective is to write winning proposals so that the company gets more business and I don’t get fired. I worked with a guy named Bob Richards for about four years - he taught me the basics of writing contract proposals. Bob was a Program Manager who performed as the DSIS Chief Information Officer, Quality Assurance Manager, Operations Quality Control Manager, Facility Security Officer, and Phase-in Transition Team Leader. Bob was also responsible for writing contract proposals. Bob had a lot of work on his plate so that is probably why they hired me. Bob retired in December, 2014. In addition to writing proposals, I take care of the DSIS and KST Websites and any database or programming requirements that might come up.**

**Ka’ala Systems Technology Corp. (KST) is owned and operated by Adrian Yunson. This company is sharing the office space in Aiea. Since the DSIS owner, Duke Hiyama, is thinking about retiring in the next year or two, KST is in the process of taking over some of the DSIS contracts along with trying to get new business. As a result, all of the corporate office employees (Darrell Pojas, Brooke Irvine, Chris Ashby, Francis Miyazama, and me) are doing work for both companies.**

**The way it works for companies like DSIS and KST (and there are lots of them) is they scan different government contract solicitation websites like FedBizOpps.gov (Federal Business Opportunities) looking for possible Information Technology (IT) contracts coming up that looks interesting and meets our company’s requirements and capabilities. When we find one, I will examine the Request for Proposal (RFP) in detail to make sure DSIS/KST qualifies to perform the required duties. Once we find an RFP or Solicitation that looks good, we must then get final approval from our boss (DSIS President and CEO) Duke Hiyama and/or (KST President and CEO) Adrian Yunson. Once the okay is given, then we start the proposal writing process and go for it – try to win the contract.**

**Most proposals consist of four hardcopy volumes and a computer CD. The volumes are:**

**1 - GENERAL that contains a Cover Letter and standard information about our company and an outline/summary of the proposal.**

**2 – TECHNICAL that tells the government our company technical approach and how we plan to perform all of the requirements listed in the Performance Work Statement (PWS).**

**3 – PAST PERFORMANCE provides information about how our company performed on 3 to 5 past or current contracts.**

**4 – COST/PRICE gives the government the dollar amount DSIS or KST is bidding for the contract.**

**The CD contains a copy of the complete proposal.**

**The two volumes that require the most work for me are the Technical and Past Performance Volumes. The Cost/Price we bid depends on the required labor positions and equipment costs. Management determines our final bid. So far, my job has been mostly writing the Technical Volume and getting everything prepared to send in.**

**The following steps describe the proposal writing process that DSIS/KST and most other companies use:**

**STEP 1 – Review Solicitation Documents (RFP).**

* **We read the entire RFP but the three main sections that must be examined and re-examined are:**

 **SECTION L – Instructions, Conditions, and Notices to Offerors**

 **SECTION M – Evaluation Factors for Award**

 **PWS – Performance Work Statement**

* **I write-up a summary of the general requirements including the contract number, contracting POC information, proposal deadline, required volumes with page limits, maximum contract value, etc.**
* **All personnel involved in the proposal prepare a list of questions with things we don’t understand about the RFP requirements and submit them to the Contracting Office POC.**

**STEP 2 – Determine if you are going to have a partner or subcontractor on this proposal bid. If so,**

* **Identify partners and type of arrangement.**
* **Prepare and receive signed agreement from partners.**
* **Determine each partner’s level of effort for this project.**
* **Determine number and job positions for each company’s staff.**

**STEP 3 – Technical Strategy Meetings**

**The purpose of these meetings is to identify the competition and their strengths and weaknesses. Develop a strategy for writing each technical section and for the overall proposal. We also use these meetings to get advice and help writing the proposal from technical experts working for DSIS/KST and other trusted.**

**STEP 4 – Writing the Technical Proposal**

* **Determine document format.**
* **Prepare draft outline for proposal.**
* **Select technical writers for each section. Note: Larger companies have a proposal writing staff of several people who’s only job is writing technical proposals. DSIS and KST are small companies and right now I’m writing the Technical portion of the proposal with help from Darrell Pojas and Adrian Yunson.**
* **Setup a schedule for having draft and final technical proposal done.**
* **Write, review, and edit the document.**

**STEP 5 – Prepare Past Performance References**

* **Determine the past performances to use.**
* **Use RFP specified format.**
* **Prepare and send out past performance questionnaires, if required.**
* **Update and/or prepare past performance information as needed.**
* **Review for accuracy and completeness.**

**STEP 6 – Prepare Cost/Price Bid Document**

**There is a standard way of preparing the Cost/Price Volume. It must be carefully computed based on the type of personnel, travel, and materials required for the contract. It must be accurate as to not underbid or overbid on the Price Bid. At DSIS, Duke Hiyama will determine what our final price bid will be.**

**STEP 7 – Finishing Touches**

* **Spell check and grammar check on sections.**
* **Run a “Readability” check on the Technical Volume.**
* **Make sure all appendix documents are ready.**
* **Prepare covers for all of the volumes.**
* **Prepare Section Tabs/Dividers for Technical Proposal and Past Performances.**

**STEP 8 – Print and prepare required CD**

* **Determine if documents are to be printed on one side or both sides of paper.**
* **Determine if documents are to be all black and white or in color.**
* **Print additional maps, pictures, or graphics.**
* **Determine how proposal will be packaged.**
* **Print all required volumes (plus copies) and put in binders.**
* **Check pages in each copy for legibility.**
* **Check each copy to ensure no pages are missing.**
* **Prepare label for the CD**
* **Download complete proposal to CD in the required format.**

**STEP 9 – Package and send out proposal**

* **Prepare outside address label.**
* **Box up proposal volumes.**
* **If proposal is for an on-island contracting office, then hand carry it.**
* **If proposal is for an off-island contracting office, send it by UPS at least three days before the deadline.**

**Okay, that’s an overview of the contract proposal writing process.**

**DSIS/KST are always looking for ways to improve their proposals. All this brings us to the purpose of this article – How to Write Winning Contract Proposals. I researched more than a dozen websites that all claimed they were the greatest contract proposal writing companies in the world. The only problem was they would tell you a few things that you already knew and then tell you that for a “bunch” of money, they would tell you the real secrets of writing winning proposals. I found one website that was a little more liberal with their proposal help and what they had to say seemed to make the most sense. Therefore, a lot of the information below came from this website:**

**http://www.captureplanning.com/ Great resource for learning about business development and how to write proposals that win contracts.**

**Proposal development expert Beth Wingate offers the following tips for reviewing Federal Government RFPs (solicitations). Reviewing a Federal Government solicitation combines both a strict process and creativity.**

**Draft RFP**

**When I’m lucky enough to receive a draft RFP, I follow a standard process—reading the solicitation, evaluating the requirements, creating my outline and requirements/compliance matrix, creating checklists, and then preparing briefing charts for my bid/no bid review. Even if the RFP doesn’t follow the Uniform Contract Code (organized by Sections A–M), I still go through the following process:**

* **Review the RFP by starting with Section L (Instructions), then M (Evaluation Criteria), then C (Performance Work Statement (PWS)), H (Special Contract Requirements), I (Contract Clauses), J (Attachments – sometimes where they hide the PWS), and then the rest of the RFP.**
* **Look for inconsistencies or places where the government has been unclear.**
* **Look for requirements that appear in the wrong RFP sections—even if they’re in the wrong section, I still need to respond to them. Over the past 24 years, I’ve found many requirements in the wrong sections, and if I hadn’t read the entire RFP soup to nuts” I would have missed because they showed up in Shipping or some other strange place.**
* **Have your contracting shop look at all of the clauses incorporated by reference—there can be some surprises hidden in them to which you may need to respond.**
* **Create a running list of ALL questions that your team, including subcontractors, has identified regarding the RFP. Then, consider each question. If you ask it, can you live with the answer? If you ask it, will it give away something about your solution to your competitors? If you ask it, can you offer a suggestion to the government that will help your position?**

**Final RFP**

* **Review the final RFP (L, M, C, H, I, J, then all the other sections), looking for inconsistencies or places where the government has been unclear. Apply all my other suggestions for reviewing a draft RFP to your final RFP review.**
* **Check to see if a competitor has gotten language inserted that shows the procurement is wired to them, e.g., 20 years ago an RFP had all of my folks named as key staff! The government corrected this mistake with an amendment, but good luck bidding against me!**

**Once you finish reviewing the solicitation and carefully evaluating the requirements, you’re ready to create your outline and requirements/compliance matrix, drive your proposed solution into your storyboards or annotated outlines, create your checklists, and then prepare your bid/no-bid briefing charts.**

**Bonus Tip: Start compiling your list of questions to the government in parallel with your initial solicitation review. All questions should be reviewed by a senior management team for wording, content, and potential ramifications to your response. Submit all your questions through your contracts shop so you have a single point of contact.**

**Now, let’s take a look at 10 of the most common mistakes us Proposal Writers make:**

**Mistake #1: Not Being RFP Compliant**

**It’s pretty basic, but if you haven’t complied with the RFP requirements, the customer may not read any further. So look at what you have written and ask yourself whether you can find the response to every RFP requirement in your proposal. If you can’t find it, then you are not compliant. Sometimes all you need to do to fix it is to add the keywords used by the customer in the RFP to your proposal.**

**Mistake #2: Merely Complying With the RFP**

**Does it offer something that the customer will want more than any competing offer? When you describe your offering, are you merely fulfilling the RFP requirements, or are you providing them with something better than the competition? Are you giving them a reason to want you? In addition, if the customer will be better off selecting your offering, have you explained why?**

**Mistake #3: Not Optimizing Against the Evaluation Criteria**

**If you are writing a proposal in response to a written RFP with a formal evaluation process, ask yourself how the customer is going to score your bid. Will you achieve the maximum score possible? If not, you may need to add to your proposal, change the terminology, or change your points of emphasis so that they are better aligned with the evaluation criteria.**

**Mistake #4: Failing to Pass the “So What?” Test**

**When the customer reads “we are pleased to submit” or “our company was founded in 2000,” will he customer say “so what?” Look at everything you have written, and ask whether you would care if you were the customer reading it. If not, rewrite it so that it matters.**

**Mistake #5: Not Saying Why the Customer Should Select You**

**Does what you have written clearly articulate why the customer should select you? The evaluator must look at competing proposals and select the best one. Does your proposal say why they should select you?**

**Mistake #6: Not Thinking about What It Will Take to Win**

**Does the proposal achieve what is necessary to win? Have you even asked yourself that question? What do you have to do or achieve in writing in order to win the proposal? Ask yourself whether the proposal you have written achieves those things. This should be your primary measure of the quality of your proposal.**

**Mistake #7: Making It All about You**

**Is it all about you or is it all about the customer? Does every sentence start with “We” or the name of your company? That’s a good sign that you’re writing about yourself. Do you like hearing people talk about themselves? Instead you should talk about the results and how they will benefit or impact the customer. When you talk to a salesperson, you don’t want him to talk about himself, you want him to talk about how the purchase will impact you. This is true even when you have to talk about your qualifications. It’s not your experience that matters, it’s about how your experience will result in something beneficial to the customer. So make sure that everything you have written is about how the customer will be impacted or benefited, and not about you.**

**Mistake #8: Stating a Universal Truth**

**Does it state a universal truth before presenting your approach? For example, does it say something like “Quality is absolutely vital to success. Therefore we…” or “According to the Council of Accepted Experts, quality is vital. Our approach…” Writers, especially those with technical backgrounds, sometimes like to put their claims in context or appeal to some accepted authority before they start writing. However, this is not good proposal writing. Instead, you should be showing that your approach delivers what you say is so important. It is much better to say that “Our approach delivers the quality that is vital to success by...” or “Our approach implements the recommendations of the Council of Accepted Experts by…”**

**Mistake #9: Not Owning the Result**

**People often write in terms of things “happening” instead of saying things like “our approach delivers.” You should take ownership of the results when you work on a project. Instead of “if you select us, we’ll do the work, and you’ll get the results” you should say that “if you select us, you will benefit from the results we deliver” or “if you select us, the results we deliver will have the following benefits for you…” The benefits to the customer are benefits that you provide. It’s not bragging or ego. In proposal writing it’s logical and necessary to show the link between your offering and the results. It’s also not the way a lot of people normally write. You should review what you have written to see if you can rewrite any of the results so that you can take ownership of them.**

**Mistake #10: Building to the Finish**

**People want their claims to be credible. So they often carefully craft a proof that shows how each item leads up to their conclusion, which they deliver at the end. This is the exact reverse of the way you should write your proposals. People evaluating proposals do not want to have to read or puzzle through the whole thing to figure out what you are saying. Instead, you should tell them the conclusion you want them to reach first, then provide the supporting points that substantiate that conclusion. When reading your proposal, they should see a statement about the result or benefit you will offer them followed by how it will be achieved or delivered. Otherwise, they have no reason to keep reading.**

**More mistakes:**

**Another common mistake is avoiding commitment in your proposal. A good proposal answers the customer’s questions. A proposal done The Wrong Way sometimes tries to avoid doing this. One reason is that if you somehow win the proposal, someone’s going to have to live up to any promises made. A good proposal wins because of those promises. Doing a proposal The Wrong Way might mean avoiding promises.**

**A good proposal avoids using passive voice. A proposal done The Wrong Way sneaks it in. In passive voice, instead of a noun performing the action, the subject receives the action or is acted upon. With passive voice, you can say that something will happen, or that the project will start, or software gets written without saying who will do it. Avoid using passive voice because it weakens the statements in your proposal. Strive for clarity. But, when you get into trouble, sneak it in to obfuscate what you’re saying. If the rest of your proposal is clearly written, it may not tarnish your credibility.**

**Another way to avoid commitment is to talk about your capabilities and experience instead of what you will do. Talk about the criteria that you will use to make decisions, and list the things you will take into consideration. Talk about having processes for getting things done without saying what the steps are. Talk about the benefits that will result without saying how you will deliver them. Talk about all the things that you can do for the customer, without saying what, when, or how you will do them. In all likelihood, this is completely true, since most companies will do anything the customer pays them for, and after award you can figure out what is included and what is an extra charge.**

**Finally, promise both sides. Say that you will involve the customer in decision making, but will not require any effort on their part. Offer them a single point of contact, but empower everyone on the project to solve the customer’s problems. Another example would be to offer to hire all of the incumbent staff but only if the customer likes them. You should separate conflicting statements by at least a paragraph, instead of putting them in the same sentence like we have done. Worded properly, you should not even be able to tell that there is a conflict.**

**Remember this – Most proposal evaluators are told by their boss to go to Contracting and be part of a Contract Proposal Review Board. They don’t really want to do it. I know this because when I was working for the Government, I had to do this twice and I hated it. The contracting officer gives you instructions and checklist of things to look for. Then you split up the contract proposals (there were about 30 each time I was on the review board) and you have to read and evaluate each one given you. If the proposal meets all of the requirements and everything is checked off on your list, you put it in the “good” pile. If something is missing or proposal doesn’t meet the requirements, it goes into the “bad” pile. The last time I did this, we ended up with six proposals in the “good” pile and 24 in the “bad” pile. This process took two whole days. After all that, the company I wanted to win the bid didn’t get it because another company’s price bid was lower. The proposal evaluators don’t get to see what each company bid. The company that met all of the technical requirements and had the lowest cost bid got the contract.**

**I found this interesting article on "Linkedin" – It was written by Bob Lohfield on October 17, 2011 (**[**http://www.lohfeldconsulting.com/**](http://www.lohfeldconsulting.com/)**): Note: I just checked and this site is still out there and contains updated information on proposal writing.**

**I received a call from a mid-sized “large” business that had submitted a proposal for IT services and had just learned their proposal did not make competitive range. They were irate and wanted to protest, alleging that the government had not fairly evaluated their proposal.**

**They had hired a proposal consultant, spent lots of money developing their proposal, and were assured their proposal was professionally done. Before filing the protest, the company asked me to review their proposal. Here’s what I found when I did the review and what I told them.**

**Professionally developed proposals always have the same characteristics — they are compliant, responsive, compelling and customer focused. They present a solution that is easy to evaluate and score well — and they are aesthetically attractive. I used each of these criteria while reviewing this company's submission.**

**Compliance**

**The proposal’s structure is expected to follow the request for proposal’s instructions (section L of this RFP) and also track with the evaluation criteria (section M).**

**Initially, this proposal followed section L, but then it departed and added sections not called for in sections L or M. It then skipped required section L topics. Finally, some evaluation criteria were never addressed in the proposal. The easiest way to lose points during an evaluation is to not follow the instructions or not address the evaluation criteria. Simply put, this proposal was non-compliant.**

**Responsive**

**The content of each proposal section must respond precisely to each topic prescribed in the RFP. The section headings should track to the RFP instructions, and the associated discussions should be consistent with the section headings. When proposal text fails to address the sections heading, the sections are non sequitur, e.g., an applicable response does not follow a particular section title.**

**The proposal seemed to have section text that was lifted from other proposals and pasted into this proposal. The responses were close, but not close enough. To the non-practitioner, much proposal text sounds alike. After all, if the RFP asks for a QA Plan and we give them a Configuration Management Plan, who would know the difference? This proposal team did just that. I scored some of the sections a zero because they failed the responsiveness test.**

**Compelling**

**This is a proposal term that describes how convincing or persuasive the proposal is. In government procurements, we expect the proposal to meet the solicitation requirements fully and exceed those requirements, where practical, in a way that is beneficial to the customer. There should be many features in the proposal that demonstrate a high likelihood of contract success or that exceeds solicitation requirements. Assertions about company performance and claims about solution features should be substantiated by real evidence, not boastful rhetoric. Features with relevant and substantiated benefits, presented persuasively, provide the basis for selecting one bidder’s proposal over another.**

**In this proposal, as I read through 200 pages of hum drum technical prose, I found features were few and benefits were even fewer. There was no basis for differentiation and no compelling basis for selection. This was not the way to write a proposal.**

**Customer-focused**

**Proposals are customer focused, and marketing brochures are company focused. A customer-focused proposal discusses how your company proposes to do the work and the benefits the customer will receive from your performance. If the proposal just brags about how good the company is and how outstanding its processes are, then the proposal is company-focused at best. Company-focused proposals cause evaluators to lose interest, whereas customer-focused proposals hold evaluators' interest and score higher.**

**Slogging through 200 pages about how good this company is does not substitute for a cogent explanation of what the company planned to do and how it was going do it. If I had read one more time that their processes were "best of breed" or "world class," I think I would have just closed the book and quit reading.**

**Easy to evaluate**

**Evaluators generally start their review with the proposal evaluation criteria in section M of the RFP. They build an evaluation checklist, and then go looking through the proposal to find information that addresses the topics in the evaluation checklist. They search for only what they need to find to evaluate the proposal and write up their evaluation results. Call-out boxes, pull quotes, feature/benefit tables, sections headings and other techniques help draw the evaluator’s attention to the appropriate information. Every evaluator will tell you that if they can’t find it, they can’t score it. Professional proposals are structured so the key evaluation points are extremely easy to find and evaluate.**

**As you might expect, in this proposal, key evaluations points were missing or not readily found.**

**Appearance**

**Proposals should be attractive and easy to read. They should have a consistent document style, appropriate color pallet, paragraph labeling and numbering scheme traceable to the RFP, and an appropriate mix of text and supporting graphics. Single-column text is fine with half-page or quarter-page-size graphics positioned consistently on the page. Graphics should convey the intended message with the appropriate level of detail.**

**The proposal was attractive, and if you didn’t read the content, it looked like it would score pretty well. I gave them high marks for attractiveness and accolades to the desktop publishing team.**

**At the end of my review, I told the company executives to save their protest money. In this case, the government did them a favor by eliminating their proposal from the competitive range. This proposal was not professionally done, even though they thought it was, and it had no chance of winning. After the review, they agreed not to protest and resolved to do better next time.**

**Summary**

**So, what did I learn from this article and from the other websites I reviewed?**

* **You must read the entire solicitation (RFP) more than once and follow the instructions in Sections L and M.**
* **Don’t copy stuff from other proposals without carefully reviewing and modifying it to match what this RFP is asking for.**
* **You want to make it easy to evaluate your proposal. Don’t add a lot of extra paragraphs that are not directly related to what the RFP is asking for.**
* **Write the proposal to meet or exceed the solicitation requirements fully and in a way that is beneficial to the customer.**
* **You want to state your conclusions and your strong points up front instead of waiting until the end of your proposal.**
* **Give them what they are looking for in firm, positive statements. Details can follow later.**
* **Tell them what your technical approach will do for them and then tell them what the approach details are.**
* **State your case without a lot of details and do it in an order that makes it easy for the evaluator. Proposal evaluators are trying to get through all these proposals as quickly as possible and they are looking for a reason to throw out your proposal. Your job as a Proposal Writer is to persuade them that your proposal meets all of the requirements. It is always a good idea, in any type of writing, to imagine what it’s like to be the reader.**

**One last thing I learned during this exercise that I will share with you. It is called The Flesch-Kincaid Readability Statistics and it is a feature of MS Word. Here is how you turn it on:**

**1. Open the document you are going to examine.**

**2. Click File and Word Options.**

**3. Click Proofing.**

**4. Make sure Check Grammar with Spelling is selected.**

**5. Under Correcting Grammar in Word, select the Show Readability Statistics check box.**

**6. Click on Review.**

**7. Click on Spelling and Grammar.**

**8. Correct or ignore possible errors.**

**9. At the end, the Readability Statistics will show in a pop-up box.**

**I run this against the Nellis BTS Technical Proposal and here are the results:**

 **Readability Statistics:**

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| **Counts** **Words** **Characters** **Paragraphs** **Sentences** | **My Results** **14701** **85258** **665** **667**  | **Good Ranges** |
| **Averages** **Sentences per Paragraph** **Words per Sentence** **Characters per Word** |  **2.6** **19.5** **5.5** | **Less than 5****Less than 20****Less than 8** |
| **Readability** **Passive Sentences** **Flesch Reading Ease** **Flesch-Kincaid Grade Level** |  **21%** **30** **13.6** | **Less than 15%****40 to 50****8 to 10** |

**As you can see by my results, I must improve the readability of my proposals. Flesch-Kincaid says it would take a college student to understand my write-up. I must dumb it down a lot!**

**I did learn a few things and I hope it shows on my future proposals.**

[**http://bigdrifter.com/**](http://bigdrifter.com/)