



SUCCESS
Next Exit

How to Prepare a **WINNING** Proposal!

Road To Success

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Welcome!



What if.....

- Each time you decided to pursue a job or contract, you could feel 100% confident in your decision?
- You had a guide to help you navigate the process?
- You created a foundation today to enable you to pursue opportunities you've never sought before?

Then let's stop asking "What if" and start asking "What's Next?!"

Why me?

- **Full Circle Communications**
- **Won over 45 projects as either a prime or sub**
- **Executive Coach, Trainer for Tony Robbins**
- **Recently won:**
 - City of Atlanta Program Management Services, Stantec
 - Fulton County Library D/B Services for Library CIP Renovations – Group 2, EDT Engineering
 - Gwinnett County Lake Lanier Low Pressure Sewer Project, BC
 - DeKalb County Rockbridge Rd. Water main replacement Project, Reeves Young
 - COA Sewer Group 3 Rehab, EDT
- **Worst day ever**
- **Best day ever**



What about you?



- Name
- Business
- What's amazing about your business?



What about you?



Why are you here?



Agenda

Assessment

Is this a good fit for us? The Assessment Process

Foundation

General Proposal Info Applicable for both Primes and Subs

Prime

Prime Contractor Key success elements to consider if proposing as a Prime Contractor

Sub-consultant

Sub-Contractor Key success elements to consider if proposing as a Sub-Contractor

Follow-up

Follow-up Win or lose, what do you do next?

Assessment

Is this a good fit?



1. First!! Review the RFP!!!

- **Scope**
- **Insurance requirements**
- **Experience requirements**
- **Financials**
- **Deadlines**
 - ✓ You must review RFP carefully **BEFORE** the deadline for questions!

Assessment

Is this a good fit?



2. Self assessment

- What are your services?
- Experience/Project History
- Knowledge of the client

Assessment

Is this a good fit?



3. Are you bidding as a prime or a subcontractor?

With that decision made....

**4. Who is your competition?
What is your "Silver Bullet"
(Differentiating Value
Proposition)?**

Assessment

Is this a good fit?



5. Go/No-Go Process

A strategic analysis to determine if a pursuit is worth the investment of time and money based on a series of considerations, in order to make an objective decision.

ABC Company Proposal Decision Process

RFP:		Contract Name: CCWA New Great Project		Go/No Go Analysis			Points	
		5	4	3	2	1		
Strategy/Strategic Plan	1	Does it meet our strategic objectives?	Excellent	Above Average	Average	Below Average	No	
	2	Would the product enhance our reputation or competitive position?	National Exposure; good future positioning	Regional exposure; good future positioning	Good for local market	Brings money in and allows a routine to stay active	Single, low visibility opportunity	
	3	Is there a good reputation/working relationship between ABC Company and client?	Excellent	Good working relationship	Known but not well cultivated	ABC Company reputation	Unknown or poor	
Marketing	4	Did we advance information?	Yes, able to prepare response prior to RFP release	Above Average	Knew RFP was coming out (average)	Below Average	None; Complete surprise	
	5	Is this a real project that will meet an actual need?	Regulatory deadline established	Need for future critical planning	Results needed within 1 year	Sometime in future	No schedule requirement	
	6	Do we know the evaluation process?	1 to 2 people	3 people committee	Small committee at 1 meeting	2 step committee selection process	Large committee then political group	
	7	Do we know who is the "money man", and who is the user group and the technical screener group? Is there a "coach"?	Yes, able to prepare response prior to RFP release	Uncertain as to money man but others known	Not all players but there is a coach	Uncertain as to all players and no coach	No identification	
	8	Is the RFP defective, contradictory, ambiguous?	Well written	Above Average	Vague or confusing in 3 areas (average)	Below Average	Poorly written	
	9	Is there sufficient time/resources to prepare a proposal?	Excellent	Above Average	2 weeks, tight resources (average)	less than 2 weeks, tight resources	1 week or less, tight resource	
Technical	10	Will winning the job over-book staff capacity?	No	Can use other ABC Company offices	Unlikely	May have problems	Yes	
	11	Do we need subcontract(s)?	Services in-house	Teaming completed	Existing sub pool can be used	Best subs need courting	Search required	
	12	Is there opportunity for profitable extra work?	Excellent	Above Average	Average	Below Average	No	
Competition	13	What is the competition?	Sole Source	1 or 2 other firms	Open or no clear leader	Lots of regional competition	All the major players	
	13A	Do we know key issues for decision?	Yes, they favor ABC Company	Yes, no favorite known	Some ideas	No ideas	Yes, they favor the competition	
	14	Can we be ranked third or higher?	Clear leader	Within top 3	Probably	Uncertain	No	
	15	Have we successfully bid against competition before?	Many times	Frequently	Occasionally	Seldom	Never	
Contracts/Costs	16	What is the probability of a win?	Excellent	Above Average	Average	Below Average	Poor	
	17	How are the contract terms & conditions?	Acceptable	Satisfactory	Minor modification	Major modifications	Changes not acceptable	
	18	Can we establish a profitable, competitive pricing strategy?	Meets ABC Company Cost	Honest credible and within limits	Reasonable and competitive	Must cut corners, cost share, etc.	No	

Fill in sections in green

* Rating: <39: strongly reconsider pursuing this opportunity.
39-54: reconsider benefit of pursuing, can we overcome
54+: go.

Note: If 20 or less points scored on questions # 1, 5, 9, 10, 16, or 18, decision discussion required.



Foundation-General

The basics



1. Specifics of each organization

- Response requirements
- Addenda
- Formats; Number of copies
- Mandatory pre-proposal

2. RFP Review/notes/outline

3. Proposal Production Timeline

Foundation-General

The basics



4. Pricing

5. Credibility/Certifications

6. Items to **ALWAY** have on hand:

- Rate sheet
- Project write ups
- References
- Statement of Qualifications
- Resumes of staff
- EEV (Employment Eligibility Verification) Program/Basic Pilot Program ID number

Bidding as a Prime Contractor

Key distinctions

- 1. Attending Pre-bids: Why go?**
- 2. Financial Statements – P&L, Balance Sheets, tax returns**
- 3. Partnering: Building a Strong Team**



Bidding as a Prime Contractor

Key distinctions

4. Production:

- Timeline
- Templates/graphics
- Editors

5. "Non-Responsive"

6. Common Mistakes



Bidding as a Sub-Contractor

Key distinctions



How do I become a sub-contractor on a team?

- Who's winning?
- Are you adding value?
- Pre-bid meetings
- Certifications
- To be, or not to be, exclusive?



Bidding as a Sub-Contractor

Key distinctions



How to be a great sub-contractor/teaming partner!

- **Verify & Clarify**
- **Pick up the phone!**
- **List of items needed:** logo, forms (notarized), scope, pricing, resume templates, experience matrix
- **Meet deadlines**





Follow-up

Things to remember

What if I don't win? (Prime Contractor)

- **Thank-yous!**
- **Client debrief with agency**
- **Team debrief**





Follow-up

Things to remember

What if I don't win? (Sub-contractor)

- **Thank-yous!**
- **Build database**
- **Maintain relationships**





Follow-up

Things to remember

What if I do win?

- **Celebrate!**
- **Read your contact thoroughly**
- **Stay within budget; adhere to deadlines**
- **Deliver excellent work and client/customer service**





Questions?

**If you have additional questions,
let's share them now!**



**Thank
You!**

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