

Getting Ready for the Next Big Win : Proposal Readiness Review (PRR)

Effectively investing proposal preparation dollars is critical for any contractor. The Proposal Readiness Review (PRR) is a low-cost tool to help you accomplish this.



Introduction:

A hallmark of every successful organization is the ability to plan, execute the plan, modify the plan when needed, and see the process through to the end. Dwight Eisenhower, our 34th President, said “In preparing for battle I have always found that plans are useless, but planning is indispensable.” The best result of planning is the effort put in identifying the various outcomes and then determining the previous actions needed. In the proposal process we have a technique to do this, giving us a framework for approaching any solicitation. This is the Proposal Readiness Review (PRR).

WHAT IS A PROPOSAL READINESS REVIEW (PRR)?

Simply stated, a PRR is a set of activities undertaken prior to RFP release to prepare the organization to develop a winning response/content by providing a framework for action. While the review can take place any time prior to the solicitation release, some activities are best performed well in advance. In reality, the review is a checklist that identifies what has been done, what should be done, and assists in determining how prepared the organization actually is for the response effort.

DEFINE, RESEARCH, INTERACT & DO (DRID)

None of the concepts of a readiness review should be foreign to any seasoned Capture/Proposal Manager. The range of activities undertaken during a review are all things the individuals routinely do, but, generally, with less structure. I prefer to think of the process as **Define, Research, Interact, and Do (DRID)** as described below:

DEFINE: This part of the process is straightforward but is often left until too late to bear the fruits that it could. Simply put, have you identified the capture and proposal roles in sufficient depth and with enough lead-time for them to become fully engaged and effective? Only by doing so can there be adequate time for these individuals to define things like win strategies and themes that are good enough to win.

RESEARCH: There are several items here that lead to an understanding of the requirements, your competition, your own strengths and weaknesses, and starting to develop your solution. This is an ongoing process from the initial “walking the hall” stages of capture to delineating your solution in a compliant and responsive manner.

INTERACT: This involves your activities relating to the direct customer. These items are all done with the knowledge that opportunities missed will become opportunities lost once the solicitation is released and the “cone of silence” drops.

DO: This involves activities such as reaching out to incumbent staff, performing competitive analyses/“Black Hat” assessments, and pursuing potential teaming/subcontracting relationships. Many of these will involve senior leadership making informed decisions about the effort and the depth of the activities to be undertaken.

HOW DO I PERFORM A PROPOSAL READINESS REVIEW (PRR)?

The PRR assesses the status of all the activities required for success and identifies where these activities need to be refined to provide the highest possible Pwin. The highest level of success will be had by using a checklist tailored to your organization. This checklist helps you complete the initial PRR.

Then, you can use this baseline PRR to take a series of “snapshots” throughout the pre-proposal period. When activities have not been accomplished or completed, mark them **RED** and then identify mitigation steps necessary to turn them **GREEN**. Your organization may have an intermediary status for some activities, but I find that a binary choice will quickly get the attention of senior leadership and help them provide the necessary focus.

For organizations not having an identified readiness process, I suggest selecting an experienced outside consultant. This will help you to learn how to do it right the first time.

HOW DO I PERFORM A PRR (Continued)?

He or she will begin by developing a checklist template appropriate for your organization. Then help you prepare the PRR. This resource should start by reviewing any available processes and resources, then developing the checklist for the initial snapshot. Once that snapshot is taken and mitigations are identified, then the process is simply a matter of taking successive snapshots to identify where changes are necessary.

A variety of things can happen that could cause a change from green to red. For instance, any of the following might force a relook at the capture/response strategy:

- **A change in the make-up of the potential Source Selection team to be either more or less favorable.**
- **A change in acquisition strategy.**
- **A change in draft documents that aren't congruent with the customer's originally stated intent.**
- **Funding changes.**

This list is not exhaustive.

How long will it take?

The initial checklist process should take no more than 24-36 hours, though it may be spread out over a longer duration. The report generated from the initial checklist serves as an inflexion point for increasing your Pwin and establishes your path to a winning response. The process of addressing the initial checklist will usually take more or less time depending on the size and complexity of the opportunity and your familiarity with the customer. Once the initial PRR is completed and the mitigation strategies identified, each subsequent snapshot should take no more than 1-2 hours, absent any major change involving the bullet points above.

What material should I have available?

The reviewer will need all in-process capture information and access to Capture/Proposal Managers who are familiar with the requirements and customer. For technically complex programs, a solutions architecture might also be needed to help define the technical items that would be required as a result of the research stage identified above.

Who should perform the PRR?

In a perfect world any qualified Capture/Proposal Manager should be able to perform a readiness review with few, if any problems. However, there are a few considerations to this:

- Look for an individual that can be completely objective.
- The reviewer should have sufficient distance from the effort to provide a dispassionate review.
- The reviewer may work for the line of business involved, but having an outside reviewer will bring a fresh set of eyes to the process and perhaps identify items that might normally be missed.
- The use of an outside consultant will generally result in complete objectivity and lead to greater credibility with senior management.

Case Study:

A large aviation company competing for a multibillion-dollar contract: Even though a draft RFP was available, a readiness review identified activities that needed to be done on the marketing side to make potential decision-makers aware of the company's full scope of capabilities. The review activities became a standard activity through weekly meetings where activities were reviewed and mitigation strategies identified.

A medium-sized IT consulting firm was pursuing a large contract with the Navy: Part of the review identified that, while they were aware of previous issues with scope creep and change management with the customer, they had not identified any activities required to position themselves as having a solid configuration management or change control management capability.

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