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Proposal Management Guide

With Emphasis on Managing High Technology Development Proposals

By S. A. Siegel

About the author Stuart A. Siegel:

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He was born and raised in Queens New York and currently lives on Long Island New York with his wife. They have three grown children and six grand children. He enjoys skiing, sailing, and golf and in his spare time he writes. Having mostly written non-fiction educational material he is currently experimenting with writing fictional accounts of money, sex and power, within the defense industrial complex.

Proposal Management Guide – With Emphasis on High Tech Development Proposals

by S. A. Siegel

Author's Note

There are many textbooks, papers and the like that address Proposal Management. The focus of the material contained herein is on the management of technical proposals.

What is beneficial to manage a technical proposal is experience and education in a technical discipline – preferably in one of the technologies that comprise a measurable portion of the project being proposed, and experience in program management of technical projects because proposal management may be thought of as the management of an entire program effort often time compressed into 30 days or less.

Beyond this, what is helpful for success is a Proposal Manager that embodies an entrepreneurial spirit coupled with a business sense that augments their technical and management abilities because the end product is much more than just a document; it is oftentimes the future of the company.

In my view there is one key personal trait that a Proposal Manager in charge of a technical proposal should embody to be successful and that is tenacity and the avoidance of intellectual laziness – knowing what is needed to be done, no matter how intrusive to the status quo, and initiating the go-do action.

Additionally, too often a project is designated as a 'Must-Win' program by senior management. It is typically so stated because it is either essential to the overarching goals of the company or it is essential for the company's continued viability. It is therefore important that a proposal manager have an indefatigable understanding of what a 'Must-Win' program entails.

In my experience, if I were tasked to develop a Must-Win approach to be proposed, the end product of my proposal would leave me feeling only marginally better when won as compared to a loss. The point being, Must-Win means first win, then figure out how to make it worthwhile. The end proposal product would most likely have to be bid as a success oriented bid with risk management being the highest priority when won since including all risks in the cost would most likely preclude a winning bid. So good luck when you win – only it is still better than a loss if designated Must-Win.

My motive in producing what follows is to offer a relatively brief but useful synopsis of the topics that a Proposal Manager will be expected to address. I've included templates and checklists identifying important information and strategies that need to be developed to help make the proposal management process easier. By providing insight into key aspects of the proposal process beginning with the steps leading to a team kick-off through executive review and submittal, it is intended to present a perspective and

thought process to stir interest and motivation with the goal of helping the lead manager achieve winning proposals.

Proposal Management Guide

Introduction

Proposal management may be thought of as the management of an entire program effort often time compressed into 30 days or less. It encompasses concept, development, production, and deployment considerations inclusive of total lifecycle support. Proposal management requires the same rigorous adherence to discipline and procedure as does program management. The end product is much more than just the document; it is the future of the company.

High Level Context

Generally speaking, at the Executive level of a company, business opportunities are addressed as part of a master plan that sets the strategic direction of the company. Long-term financial goals and marketing objectives are defined. These objectives comprehend the anticipated need for products, technologies and services to satisfy requirements of domestic and international customers. In support of long-term objectives, near term and annual marketing plans are prepared which identify and address specific marketing opportunities. Research and Development (R&D) directed at technology or product development maybe initiated. In support of specific marketing opportunities, Bid & Proposal (B&P) funds are allocated to implement required proposal activity in response to an actual or anticipated Request for Proposal (RFP).

PRE-RFP Customer Liaison

Direct communication with the customer and user community is invaluable to develop an understanding of what is required to win. The customer is most accessible prior to a request for information or request for proposal release. It is not only important to gain knowledge of the requirement and specification particulars, but also the perspective of everyone involved in the evaluation process must become known. In this context, potential solutions, concepts, hardware demonstrations, white papers, etc. can be presented. The goal is to establish credibility and to gain customer insight. Hence, early customer and user communication on a broad sense is recommended. Customer and user organizations and key personnel need to be identified. A contact plan should be developed. Political support should be considered. Briefs and demos need to occur. Strategy must be defined and implemented. Frequently, this may involve teaming. All such activities must be tightly coordinated to assure a focused strategy. The proposal manager in concert with marketing should define these activities.

Proposal Leadership

Assignment of a single point proposal management (PM) authority is key. Proposal management is more than a full-time effort because of the time constraints and the competitive nature of the task. The effort cannot be perceived as an inconvenience, or a diversion from a more primary role. Ownership must be established.
In order to plan and implement activity intelligently, the PM must be informed. This includes developing an understanding of the specific project in relation to the marketplace and its relation to corporate goals. A close and cooperative working relationship with marketing is essential to solidify a winning team. It also includes developing an understanding of the requirement and the customer.

The PM defines, plans, and implements technical and program activity. A formal technical team assignment probably will not occur until the specification (draft, formal or otherwise derived) is available. However, technical support will be required to gain knowledge of and iterate the customer's requirement. Early price versus performance assessments are a must. The competitive process generally results in a winning approach that yields the highest performance and the lowest price.

Assembling the Team

Upon receipt of the RFP, the first activity is not a kick-off meeting. A substantial amount of work is required prior to a kick-off. The kick-off involves all functional disciplines and is intended to inform all such that required text and pricing can be generated. Hence, initially the PM must read the RFP in its entirety inclusive of the Specification, Statement of Work (SOW), Contract Data Requirement List (CDRL), the RFP instructions, Award Criteria, Terms & Conditions (Ts & Cs), etc. to understand the required personnel and resources needed for a response. If the technical team has not yet been defined and involved, then setting up the technical team is the first order of business. Assembling the right people is key. The selection of a systems engineer to help define an optimum system architecture, assess trade-offs, manage the construction of the technical volume and assure compliance and responsiveness to spec particulars is key. Also key is assignment of a mechanical engineer who, among other things, will manage the construction of the design disclosure package (drawings, etc.) that is essential and prerequisite to the effective participation in pricing by the operations group.

Aside from the technical team, it is important to assign personnel to be responsible for the construction of the various proposal documents. Typically a proposal includes technical, management, logistics, and cost volumes. Each requires a designated manager with functional understanding of the discipline. Equally important is the selection of the proposal illustrations and word processing text files manager.

Executive Summary

A very significant document comprising the submittal is the Executive Summary. This document will receive great attention by all reviewing parties and its construction should

begin very early to clarify the overarching themes and messaging so all other inputs are in sync and aligned. Accordingly a very senior person is traditionally assigned this task.

Design

Aside from sequestering the technical team in a 'war room' to maximize communication, stimulate creativity and accelerate productivity, it is critical to understand an important point. A kick-off can get other departments working, but, without a design, their productivity is greatly limited. However, even though the proposal clock is ticking, don't rush the front-end effort. As with any design, the front-end effort characterizes the downstream results of performance, producibility, and cost.

Overtime

Proposals require a great deal of effort in a short period of time. Late hours and weekends are the rule; it is necessary; don't fight it; make the best of it. Understand that everyone wants to win. All are aware that without new business the company cannot survive, let alone thrive. However, asking people to extend themselves is insufficient out of context. Everyone wants to be and is supportive and will inject creativity if they know "What it's all about" and what is expected of them. Communicate! Lead the team!

Long Lead Activity

Subcontract competition and firm competitive vendor quotes are required to obtain the lowest cost of bought-in items. This is a long lead activity. Solicitation packages need to be prepared early on inclusive of critical specification and contractual flow-down requirements. Vendors need time to respond and negotiation requires time. Memorandums of Understanding (MOUs) or teaming agreements may be required, which are also time-consuming but strategically important.

For international projects, license approval is a long lead activity and should be addressed early to assure both State Department compliance and customer responsiveness.

Also of concern is lead-time to assure corporate level approval where exceeded thresholds of cost require such approval.

Evaluating Functional Inputs

Subsequent to a kick-off, text and pricing inputs can be expected from the functional groups. Read everything. Text must be reviewed to assure compliance, consistency, and responsiveness with proposed concepts and approaches and customer requirements. Estimates must be reviewed to assure that the scope of effort was neither over nor understated. All activity should be accounted for. Duplication of effort must be eliminated. Risk or fear factors must be identified and alleviated. More important, is to assure that a more cost effective alternative solution has not been overlooked.

Revisions

Intellectual or physical fatigue cannot be permitted to obscure what is intuitively and clearly the correct thing to do. As the proposal matures, new ideas, insights or information may dictate a need to inject a major revision to correct or enhance the proposed approach. Do it! Don't rationalize or ignore instincts because of fatigue. Tenacity is perhaps the most important personal trait required to stay the course and drive the winning approach into being. A major proposal change will occur. Be prepared for it. Seek it out. Review everything. Challenge everything. Bad news doesn't get better with age. Incorporate the improvement when it is realized. Don't wait for it to be uncovered in a downstream review with even less time for a fix; and be sure to make changes wherever there is impact, including technical, management, logistics and cost.

Internal Presentations

There are key presentations that are part of the proposal process: the kick -off, the 'red team' review, the executive program and pricing review, and the corporate review.

Kick-off

The objective of the kick-off is to get all functional groups to provide proposal specific inputs such as meantime between failure (MTBF) predictions, quality assurance plans, etc. and to estimate the cost of their required contribution to the job. Aside from a comprehensive overview of the program, a design is required for meaningful kickoff. The drawing package to define the deliverable hardware or some basis (e.g. by similarity) from which hardware costs can be estimated must be defined. Note: keep in mind, the estimates will be very sensitive to drawing count and engineering changes i.e. engineering change notice (ECN) assumptions.

Also required is a work breakdown structure (WBS) defining non-recurring and recurring work. Establishing a design work scope and product baseline is fundamental to obtaining proposal inputs including a scrubbed financial commitment and sign-up from all groups.

Other material is required as hand out in support of the kick-off and includes: copies of the request for proposal inclusive of specification, statement of work, proposal instructions, terms and conditions, quality assurance documents, etc. a WBS, WBS dictionary, and responsibility assignment matrix (RAM); contract line item (CLIN) summary including contract data requirements list (CDRL); a WBS/CLIN cross reference matrix (CRM); a program schedule identifying key milestones (which must be maintained under configuration control throughout the proposal); the proposal schedule identifying key milestones including draft and final text, functional price inputs, pricing, reviews, printing and submission; and volume outlines including responsibility assignments. If the proposal is a manufacturing intensive project, then a description of the manufacturing flow that will be proposed is needed. This is particularly important if unusual manufacturing techniques are contemplated as part of the pricing strategy.

Note: There is an advantage to structuring the technical response to be a paragraph-by-paragraph response to the specification. This facilitates the construction of the Spec/SOW to proposal compliance and cross-reference matrix, and helps assure proposal responsiveness to all requirements. Also, it is most likely in concert with the way the proposal will be partitioned for review by the issuing organization's evaluation team. Beyond this, a graphic oriented proposal that presents the message is recommended. Giving thought, upfront, to the types of tables and figures, including format and data content will help structure and clarify the message. Keep in mind, it is important to provide a response that explains how the proposed approach achieves compliance and why it is competitively superior, and not simply that it will comply and is superior.

Red Team Review

The 'Red Team Review' is intended to find flaws in what is being proposed prior to submittal. An independent team of 'gray beards' simulating the customer's evaluation team usually conducts it. It looks for failures to be compliant with the instructions in the RFP. It looks for competitive comparisons and whether they are convincing. It looks for compliance with all aspects of the specification and statement of work. In general it looks for the clarity of the messaging to determine if is a winning approach and it pays particular attention to the Executive Summary. These reviews are generally brutal and always result in major iterations to the text and design and messaging. Plan for it.

Executive and Corporate Reviews

The objectives of the executive and corporate reviews are to develop an informed and hence supportive management team; to identify and quantify risk; and to define a bid that is prudently designed to win.

Thus, in addition to a comprehensive program overview, such issues and strategy, risk, cost basis, and competitive price objectives are critical elements of the brief.

Executive & Corporate Review Presentation Content

Briefing material must be clear, concise and intelligently tailored to address the concerns of the audience and the intent of the brief. The following subjects comprise a typical proposal brief to the executive staff:

Program Definition

What is this program? Who is it for? Why is it happening? These are fundamental questions that need explanation to put the project into a context that is customer oriented right upfront.

Marketing

Elaboration on the business aspects of the project, the importance to the company, the

competitive nature of the activity, and the potential pay-off relative to bid and proposal (B&P) resource commitment is the message of this discussion. Information regarding the customer and user organizations and key personnel who will influence the selection process need to be put into perspective. Project priority in relation to other customer projects, budget data, funding status, key dates leading to award, evaluation and award criteria, and the expectation of a best and final offer (BAFO) or multiple BAFOs need discussion. A competitive assessment is required. Program potential, the most likely buy, derivative applications, relevance to company goals, competitive price goals and a bookings forecasts, provide a financial and business perspective from which the activity can be evaluated.

Program Requirements

Important programmatic data, extracted from the RFP that defines the program requirements will permit visibility into the magnitude of the effort and the expected corporate commitment. The non-recurring and recurring activities need definition. Identify program phases and deliverable hardware and data (CDRL) in accordance with the contract line item identification (CLIN) deliverables structure. Indicate deliverable quantities, rates of delivery, and schedule.

Other pertinent information such as: contract type [firm fixed price (FFP), cost-plus fixed fee (CPFF) etc…]; bid type [negotiated RFP, two-step, non developmental item (NDI), etc.]; evaluation criteria (best value, low price, etc…); payment type (e.g. milestone payments, progress payments); cash flow; security; and special issues such as warranty, penalties, offset, guarantees, pre-award demonstrations, license requirements, use of commercial off-the-shelf equipment, duration of bid validity, special facilities or procedures, and any significant terms or conditions should be identified for completeness.

Strategy

Given the preceding, an overall strategy must be defined to address winning and to put the proposed approach into perspective when it is discussed.

The overall strategy may be characterized as best value, low cost, high-performance, low risk, etc. or some combination thereof. The overall strategy is generally comprised of a technical strategy (e.g. high performance, preplanned product improvement (P3I), added features, etc.), a program strategy (accelerated schedule, significant offset, teaming, etc.) and a cost/price strategy (evaluation criteria, non-recurring/recurring trade-offs, offshore labor, best and final offer (BAFO) expectations, investment, etc.]. Each needs discussion in the context of winning.

Technical Approach

Functional and physical complexity must be conveyed. Block diagrams, exploded views and family trees readily reveal function, partitioning, and major bought-in items. Key technical issues, risks and trade-offs, need discussion as to why the selected approach is

the winning approach and it should address performance and cost-effectiveness. The availability of the drawing package that represents the design, (also required for estimating), and knowledge of design parameters such as size, weight, power and MTBF (also required for other functional efforts), adds credibility and depth to the discussion.

Program Approach

The proposed program approach must be conveyed. The program schedule that defines proposed phases and key milestones is required to reveal schedule realism. Schedule risk requires discussion. Any unique proposed program issues need explanation. For example, teaming, if implemented, requires a definition of division of responsibility.

Cost

The intent of the cost presentation is to convey: the scope of the effort; the basis of estimating the project costs; the risks and degree of certainty associated with the estimate; the effectiveness of the proposed approach as compared with alternative approaches; and the allocation of costs, both functional and physical, to permit an assessment of cost realism and completeness. Cost is defined as all labor, material, subcontract, and other direct costs (ODC) inclusive of overhead, material handling, etc. exclusive of general and administrative (G&A) costs and fee. Cost is total manufacturing cost (TMC).

The functional presentation should display the estimated hours and dollars for major labor groups such as program management, engineering, and manufacturing, for both non-recurring and recurring activities. Material and subcontract costs should be identified as well as other direct costs.

The cost presentation should also be formatted to display the physical cost of the system and its line replaceable units (LRUs) and shop replaceable units (SRUs) broken down by labor, material, and subcontract costs.

The basis of cost should be discussed to include: rate assumptions including direct labor (versus offshore considerations), overhead, material handling, learning curve assumptions, period of performance and escalation assumptions, point vs. step pricing on option quantities, capital equipment assumptions, the firmness of vendor quotes inclusive of flow downs, and internal scrubbing and sign-off status. Any presumptions on negotiated reductions or other potential for cost reduction should be identified. Other cost issues associated with special terms and conditions such as warranty or penalties should be identified. For completeness a cash flow assessment must be summarized based on cost spread over time versus a proposal expected payment schedule.

Note: If ‘Similar-to’ is the basis chosen for the cost estimates rather than a bottoms-up approach then defining the basis and factors is key and should include the following:

- Define “Similar To” Program & Basis for Similarity Factor
- Define “Similar To” Assemblies & Basis for Similarity Factors

–E.g. Re-Use vs. Re-Design
- Define "Similar To" Programmatics & Basis for Similarity Factors
  - –E.g. ILS Program, Qual Program (Qual by similarity vs. Full/Partial Qual
- Define "Similar to Estimating for Major Subcontracts"
  - –Define 'existing' Spec, Sow, etc to use for an updated quote
  - –Provide 'delta' Spec / SOW info to accompany solicitation to the Sub

Price and Price Strategy

Although the proposal manager is responsible for cost and price is a business decision, nonetheless the recommended price with rationale to include G&A and fee assumptions, exchange rates if applicable, investment and payback analysis if recommended, non-recurring versus recurring trade-offs if suggested, evaluation criteria impact, rate impact of the job being in the business space, best and final offer status, and competitive considerations require discussion to establish a prudent bid that is designed to win.

Risks

Risks, problems, concerns, contingency planning and recommendations should be discussed in relation to the proposed price.

Proposal Status

A detailed proposal schedule should identify key milestones including: design, design disclosure package, kick-off package presentation preparation, kick-off, functional estimates into pricing, pricing, reviews, draft text, red team review, final text, and submission dates. Status of activity should be available.

Overview Schedule

A summary level schedule giving a big picture of the proposal and post proposal activity through contract award should be prepared. Most proposals require activity after submission in anticipation of the best and final offer. Post proposal activity would typically include cost reduction activities, investigation of alternatives not previously considered, responding to customer questions, oral customer presentations, competitive assessments, best and final offer response and the award.

Bid and Proposal (B&P) Status

Presenting B&P expenditures to date and estimated cost to complete concludes a comprehensive picture of the proposal activity.

Check Lists and Templates

Key checklists, flow diagrams, and templates listed below are provided to help implement the above and develop the needed information and strategies to win.

- Top Level Capture Process Steps (Note: The last area of Red Team Expectations can serve as a checklist of what a Red Team typically looks for beyond assuring compliance with the RFP instructions and responsiveness to the evaluation criteria.
- The Engineering Development Proposal Process Flow Diagram showing the flow of activity discussed above including a delineated Kick-off Package Check List
- A new business Deep Dive Review Template identifying important information and strategies needed to be obtained and developed per the discussion above to win and for executive review presentation purposes.

These items are now presented in the order as listed above:

Some Thoughts on the Top Level Capture Process Steps

- ☐ Customer Interaction
  - ➢ Requirements / Solution iterations
- ☐ Solution Trades
  - ➢ Risks / Re-Use / Maturity
- ☐ Competitive Assessments
- ☐ Strategy
  - ➢ PTW
  - ➢ Business Case
  - ➢ Teaming
  - ➢ Other
- ☐ Special Issues
  - ➢ License
  - ➢ Offset
  - ➢ Security
  - ➢ Penalties
  - ➢ Funding Concerns
  - ➢ Data / Proprietary Rights

- ☐ Proposal Prep
  - ➢ Pre RFP
    - Develop Requirements from Draft RFP or other best estimated knowledge
  - ➢ Initial Kick-off – Define the solution and proposal plan
    - The right Team & War Room
    - Proposal Schedule
    - Detailed Design Solution
  - ➢ Receive RFP
    - Revisit Bid / No Bid decision
    - Iterate Design Solution – address actual requirements and 'surprises'
    - Kick-off package for estimating and proposal generation purposes
  - ➢ Kick-off – Develop the BOEs and Volumes
    - Functions - BOEs
    - Volume Leads & Volumes Authors - Text & Artwork
      - Themes – Text Headlines
      - Graphic Oriented – Action Captions

- Compliance with RFP instructions
- Compliance with Requirements & SOW
- Address Evaluation Criteria

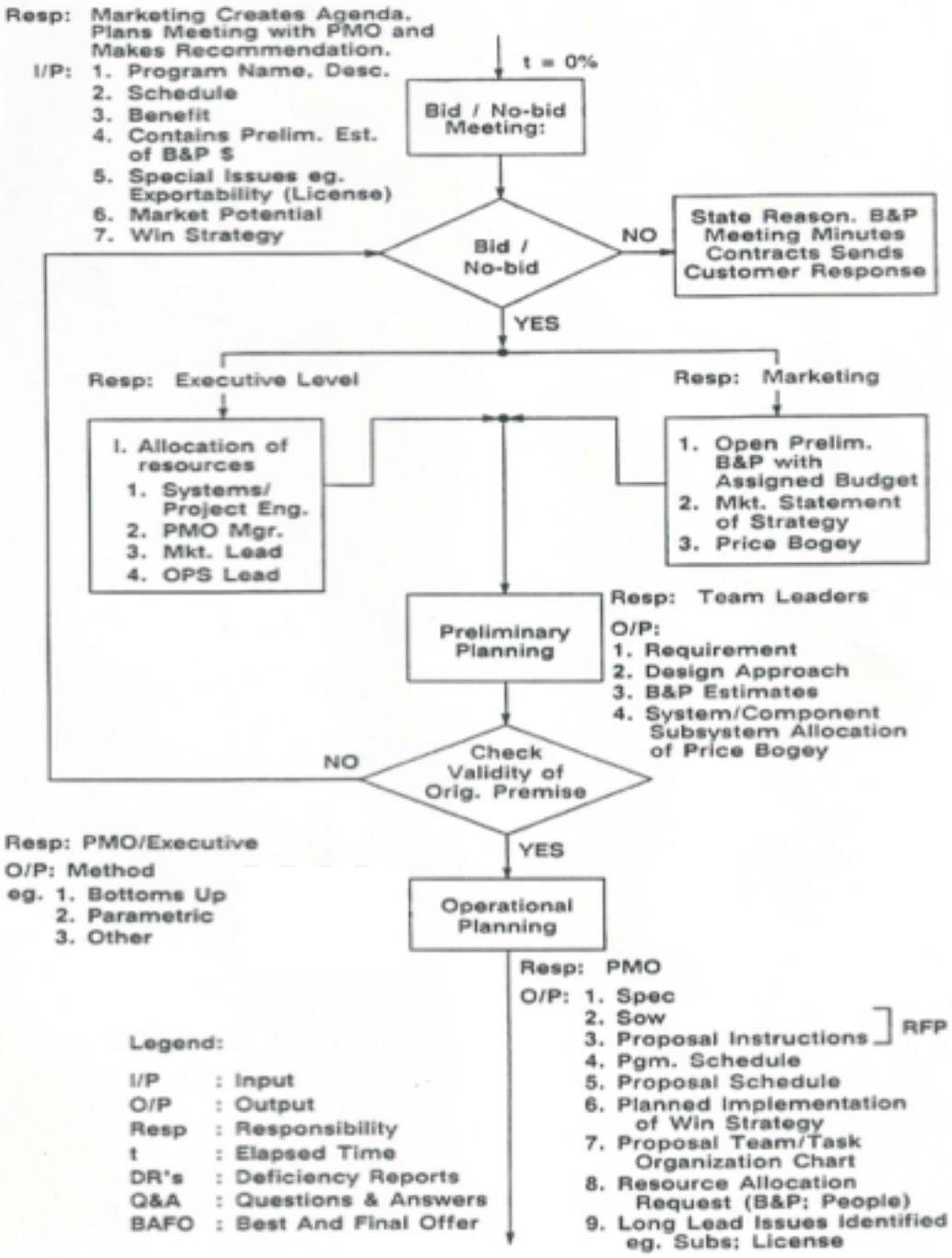
➢ Executive Summary
➢ Contracts Submittal Letter – Conditions of offer
➢ Reviews:
  - Blue Team – Win Strategy & Solution
  - Black Hat – Competitive Assessment
  - Pink Team – Story Boards
  - Bid Team Review – by Volume Leads – Pre Red Team
  - Red Team
    - Expect / Want Substantive Changes – See Red Team Universal Expectations & Check List below
    - Leave plenty of time to implement
  - Post Red Team Review and Proof Check Review

  - Tender Vet
  - Management Reviews – Director & Above; X-Functional; on-going

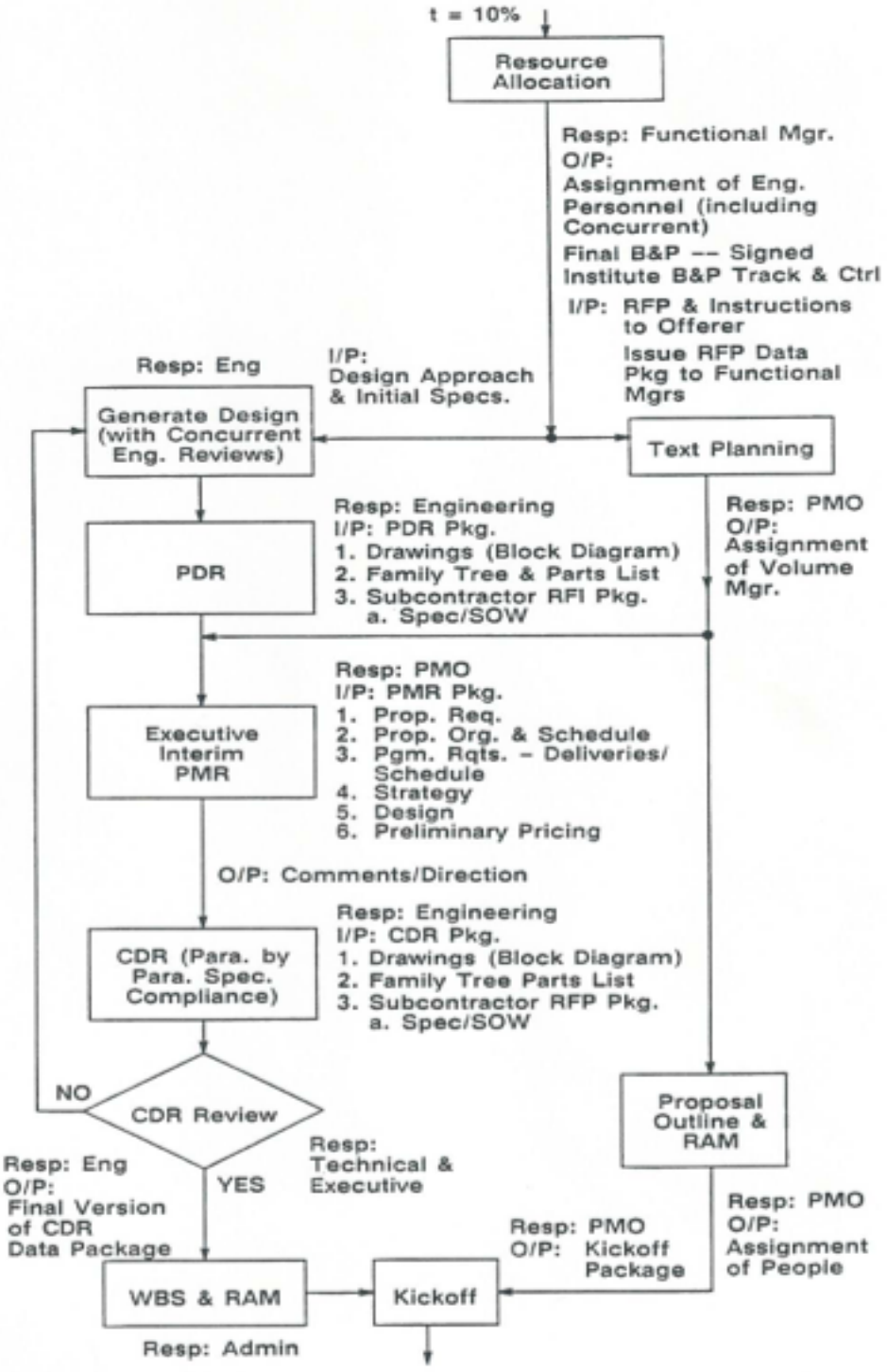
☐ Post Submittal Activity
➢ Q&A / Demos / Customer Briefings
➢ BAFO

☐ Red Team – Universal Expected Outcome
➢ The Executive Summary must be rewritten
➢ The outline needs revision
➢ There is not enough artwork
➢ Text doesn't talk to the art adequately
➢ Many proposal sections are just a restatement of the RFP requirements, and do not describe our proposed approach to meeting them
➢ A more complete description of what we're building needs to be up front in the proposal
➢ We haven't adequately shown the maturity of our design; it sounds like everything is new
➢ It needs a consistent proposal writing style
➢ ILS, Producibility, Management sections are too generic and need to be tailored to this program's requirements
➢ Proposal themes from the executive summary aren't adequately supported in the subsequent proposal sections
➢ There are not enough tradeoffs described
➢ The program plan, organization and schedules are confusing

Engineering Development Proposal Process
Phase 1
Planning



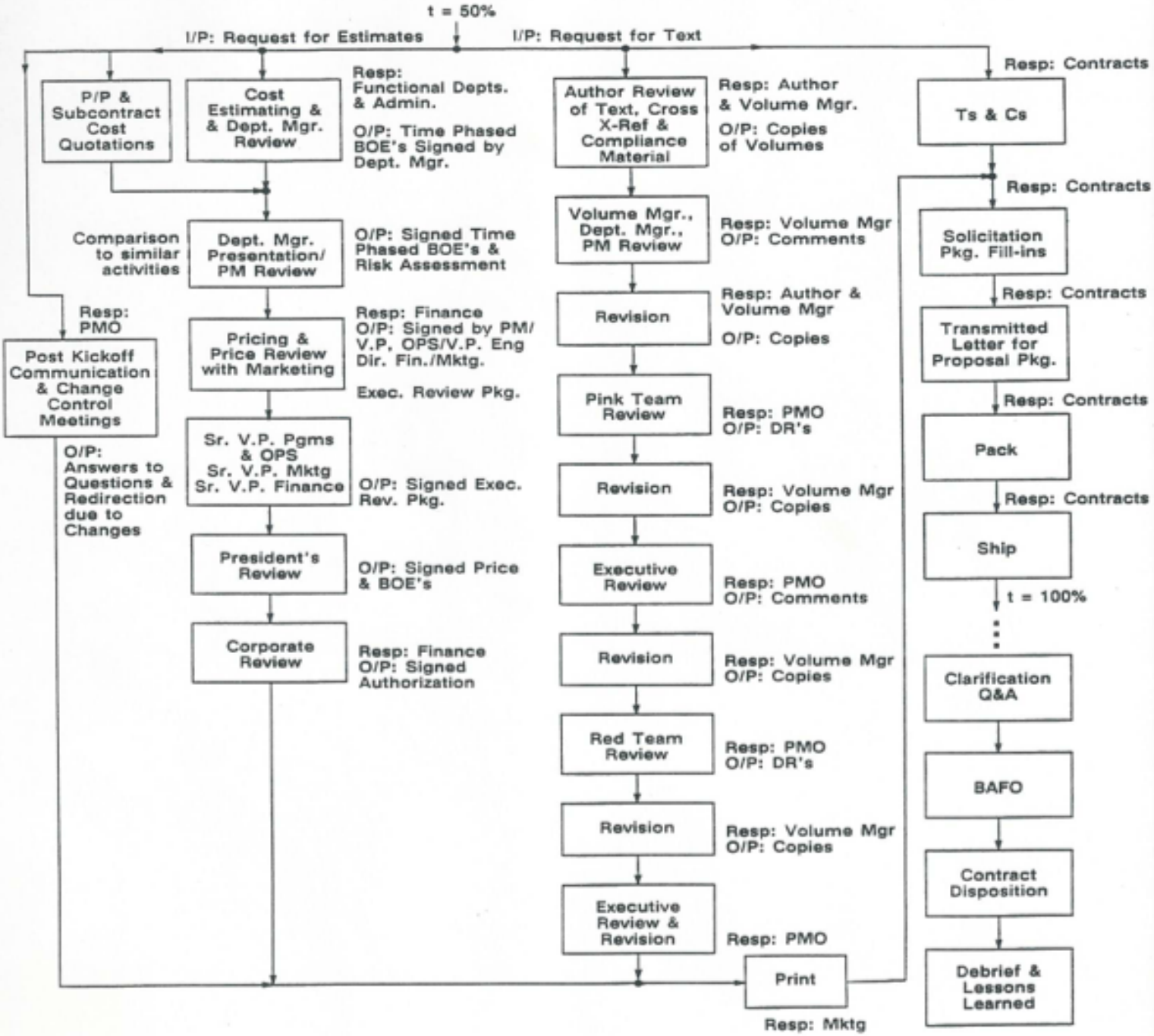
Engineering Development Proposal Process
Phase 2
Design



Kickoff Package

- **Description of Hardware**
  - Block diagram
  - Family tree
  - Parts list / Count
  - Mechanical layouts (exploded views)
  - Nos. of drawings
  - Nos. of ECN's
    - Δ of drawings
  - Software
    - Language
    - No. of Lines of Code
    - Documentation Rqts
  - Make vs. buy
    - Subcontracted items & Purchase Parts
  - Special manufacturing processes
    - Alignment
    - Surface mount
    - Test equipment
    - Support equipment
    - Build Lot Size
    - Test Failure Rate
- **Program Description**
  - Phases
    - Development/prototypes
      - Qtys/Lots/Spares
      - Schedule
      - Test philosophy
      - Data items
      - Programatics (QA, R&M, ILS, etc.)
      - Customer/user
  - Production
      - Production Start-Up
      - Qtys/lots
      - Schedule
  - ILS
      - Maintenance Concept
- **Proposal Description**
  - Schedule (milestones) itemize
  - Deliverables
  - Proposal Team Organization & RAM
  - Special Issues eg. Security, License, Warranty, Offset, Penalties
  - **Proposal Theme / Strategy**
- **WBS & RAM & Dictionary**
  - Data RAM
- **Proposal Charge No. (Budget)**
  - By functional
- **RFP Documents**
  - SOW
  - Specs
  - Proposal instructions
  - T's & C's

Engineering Development Proposal Process
Phase 3
Estimating, Text Generation & Change Control



The material that follows is intended to serve as a suggested, tailorable, guide of information needed to be developed to help be positioned to win a competitive program and can serve as the format for executive proposal status reviews.

CHART 1 – Program Summary

Program Name, Capture Team Lead, BD Lead, PM Lead, Tech Lead
Customer / Agency / User
Bid Type / Contract Value / Funding / Budget
Options Qty / Yrs / $
RFP Date / Proposal Due Date / Award Date / Contract Duration
Approval Level: BA, LoB, OG, Inc
Competitors
Award Criteria
Program Description / Phases / Deliverables
Major Subs
Special Conditions: e.g. Warranty, CLS, Penalties, License, Offset

Chart 2 – Opportunity Review (is it real)

Customer / Agency Contacted
Names & Titles of Persons Contacted
Will the procurement in question actually happen?
Are we being fooled: there is no requirement or urgent need, etc for the system
What need is causing the customer to seek a solution?
What is customer's budget for the program & funding profile?
Are there competing concepts or programs?
Does it matter - Is this opportunity important to the war fighter, the country?
Is it Strategic for us? Can we Win - Why will we be selected/How could we lose?
Why are we the best choice vs. the competition?

Chart 3 – Customer / User / Source Selection

Key Decision Makers: Define a Customer Org Chart
Show key technical decision makers & how requirements got generated
Show key source selection decision makers
Identify Customer / Agency / User - Show Key Names and Roles
Evaluation Criteria: Technical, Mgmt, Past Performance, Cost/Realism, Best Value
Source Selection Process - Describe the process eg. RFI, ROM, Demo, BAFO
Funding Stream: Define acquisition monies/annual funds available/threats to funds

Chart 4 – Strategies

Discuss Technical, Programmatic, Cost and Price Strategies
Discuss Strategic Partnering
Identify Discriminators and Themes to win

Chart 5 – Competitive Assessment (One chart for each Competitor & self)

Competitor Name, Strengths, Weaknesses, Price Expectation
Evaluation Criteria Assessment (RYGB) - Tech, Mgmt, Past Performance, Customer Satisfaction, Cost/Cost Realism, Best Value, Overall

Chart 6 – Strategic Partnering / Major Suppliers (One for each)

Supplier Name & Strategic significance
Subcontract Status
- Teaming Agreement, NDAs,
- SOW / Spec / Ts&Cs / RFP
- Supplier Proposal
- Negotiated Agreement

Compliance: Technical, Schedule, Cost, Funding, Flow-downs
Contract Type / Value: NRE, Recurring, Options
Affordability / Producibility / DTUPC / & PTW / Risk
Deliverables / Period of Performance

Chart 7 – Pre-Proposal & Proposal Status (Including Key Events / Dates)

Technical Approach:
- Are all requirements defined
- Discuss Compliance / Exceptions
- Address Architecture, Block Diag, Family Tree
- Design / Design Review Status

Cost Estimate
- Kick-off & kick-off package: WBS, IMS, etc.
- Functional BOEs
- Supplier Inputs

RFP Proposal Instructions
- Volumes
- Key Dates
- Other

Proposal Volume Status
- Technical, Management, Cost Volumes
- Other (e.g. Past Performance, ILS, etc)
- Red Team Review / Status

Price
- Tender Vet Brief & Price Sign-Off
- Internal & Supplier Inputs

Chart 8 – Financial

Proposal Cost: B&P Planned / Expended / ETC
Dependencies: Capital, GFE/CFE, Outputs from other programs, Security, Offset

Investments: Current/Projected IRAD, Other Investment to Win & Payback
Program Cost Data: State Estimating Methodology and Basis of Material / Vendors
NRE – By CLIN, Phase, Option, WBS & OBS
Recurring – By CLIN, Phase, Option WBS & OBS
Risk & Risk Mitigation Costs
Discuss Affordability / Producibility / DTUPC / PTW and 'Should Cost' and Funding

Chart 9 – Risks & Opportunities

Identify / describe each Risk and each Opportunity – for each:
Show Gross $ impact, Factored $ amount, Mitigation/Realization plan
Show how R&O and Mitigation/Realization costs are incorporated into the overall cost / price

Chart 10 – Contractual Issues / Terms and Conditions (Ts&Cs)

List all key Ts&Cs and in particular list any unusual Ts&Cs
Liquated damages / Penalties / Bonds / Guarantees
List any exceptions being taken to the solicitation
Discuss Teaming Agreements / NDAs
Discuss any Conflict / Non-Compliance with company Policy & Resolution

Chart 11 – International Issues (As Applicable)

Export license status
Contract contingencies included in bid
Prior licensing history (country, product, end user)
Anticipated issues and mitigation plan
Offset requirements
Terms, Offset plan, Issues, Negotiations, Penalties
Governing country law, currency, tax concerns, etc.

Chart 12 – Accomplishments / Issues / Actions

Discuss accomplishments / successes / issues / threats / barriers to date
Discuss significant technical compliance issues / status / actions

Chart 13 – Key Schedules & Manpower

Insert Pre-RFP Schedule, Contact Plan/Schedule, Proposal & Program Schedules
Insert Proposal Team Org Chart, Inset any Proposed Program Team Org Chart

(Note: See Managementkeyskills.com for more Program Management material including people skills for survival in a harsh management environment and for leadership relationship skills at work and at home.)