

# Proposal Writing Benchmark Study

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## Proposal Automation

### **SOW Description**

Use of automation tools to implement those steps: (see below for *those steps*)

- Requirements shredders
- Collaborative environments
- Online data/art repositories
- Knowledge management systems
- Other tools

Physical steps used to develop a proposal:

- Storyboarding
- Theme development
- Timing of kicking-off proposal teams with respect to baseline development
- Incorporation of price-to-win/cost-to-win
- Management reviews (timing, frequency, depth/level)
- Gates used to control proposal development
- Use of proposal templates, boilerplate sections, compliance matrices, etc.

### **Background** (*Issues, other considerations*)

- Focus on features of the tools that enable efficiency and effectiveness in the proposal writing process rather than with relative strength or weaknesses of a particular proposal automation tool – e.g., Kadiant vs. Synchris vs. Sant etc.
- Must consider the impact the proposal process used by the organization as part of automation process.

### **Prerequisites and Enabling Conditions:**

- Commitment to perform:
  - Provide adequate funding and resources
  - Maintain a repeatable process (BD-CMM Level 2, preferably 3)
  - Implement necessary organizational and/or process changes

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- Ability to perform – provide sufficient training in the tool to assure that proposal participants have needed competencies.

### Benchmark Criteria/Success Factors

Study Area (BAE Required and Others)	Benchmark Criteria	Success Factors
Shredding requirements(BAE) (Collect inventory of shredders and necessary features from industry partners and site visits.)	<ul style="list-style-type: none"> <li>• Relevance: extent of use by industry; manual analysis vs. use of shredder; extent that human judgment is needed</li> <li>• Accuracy: ability to identify individual requirements</li> <li>• Ease of use: simplicity, accuracy and set-up</li> <li>• Versatility: range of supported RFP documents and styles; ability to customize RFP styles as needed</li> <li>• Efficiency: degree of manual intervention required</li> <li>• Necessary features: TBD</li> <li>• Additional Features: Includes ability to create compliance matrices, allow tracking, allocate requirements, support document outlines, others TBD</li> <li>• Extent to which management can use metrics and verification</li> </ul>	<ul style="list-style-type: none"> <li>• Verify that all necessary requirements are identified.</li> <li>• Record what percentage of listed necessary features is included in the tool.</li> <li>• Record length of time needed to shred RFPs of various sizes typical those received by BAE.</li> </ul>
Providing collaborative environments (BAE)	<ul style="list-style-type: none"> <li>• Ease of use: simplicity, accuracy and set-up</li> <li>• Security: access; need to know; ability to enable team role for partners, sub contractors, competitive divisions; compatibility with Virtual Private Network</li> <li>• Integration with other elements</li> <li>• Necessary features</li> </ul>	<ul style="list-style-type: none"> <li>• Determine if tool clearly aligns with organization's process that provides for institutionalization.</li> <li>• Record how well tools match to necessary features.</li> <li>• Determine if tool has secondary devices that facilitate writers' ability</li> </ul>

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Study Area (BAE Required and Others)	Benchmark Criteria	Success Factors
	<ul style="list-style-type: none"> <li>- Process management: assign; track; manage status; distribute; review; create work flows</li> <li>- Version control: current and past</li> <li>- Q&amp;A searches of on-line repositories</li> <li>- Web enablement, 24/7 from wherever</li> <li>- Work planning</li> <li>- Notifications</li> <li>- Status reporting: checklist, management tools, content management, etc.</li> <li>- Support for process elements: reviews, editing, style formatting, production, etc.</li> <li>- DCAA (Defense Contract Audit Agency) auditable</li> <li>- Integration: email, documents, calendars, discussions</li> <li>- Management oversight “At a Glance”</li> <li>- Presence Detection               <ul style="list-style-type: none"> <li>- Informal – Who’s online; IM; real-time chat; “watercooler” conversations using technology: how to capture and harvest these conversations</li> <li>- Formal –collaborative spaces for project teams, red teams, etc.</li> </ul> </li> <li>- Behavioral change – How to motivate people to use it</li> <li>• Additional Features: capability of tools and templates; support for storyboards and document outlines, others TBD)</li> <li>• Selection and use of SMEs; capture of their content</li> <li>• Task orders; ability to shorten and tailor</li> </ul>	<p>to plan and execute their writing.</p>

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	<ul style="list-style-type: none"> <li>materials; use of templates</li> <li>• Integration of other elements including CRM, capture, etc.</li> <li>• Support for partner participation</li> <li>• Extent to which management uses metrics and verification</li> </ul>	
Harvesting and cultivating knowledge management systems (BAE)	<ul style="list-style-type: none"> <li>• Ease of use: simplicity, accuracy and set-up</li> <li>• Feature Fit               <ul style="list-style-type: none"> <li>– Search and retrieve: best way to search keyword, Google, metadata, etc.</li> <li>– Metadata tagging</li> <li>– Artifact management</li> <li>– Integration of proposal elements</li> <li>– Management tools</li> <li>– Integration with other automation elements</li> <li>– Support for content creation</li> <li>– Support for content currency reviews</li> <li>– Support for upgrading answers <i>after action review</i></li> <li>– Secondary device of the ability to rank answers in terms of fit</li> <li>– Other TBD</li> </ul> </li> <li>• Extent to which knowledge management system is able to provide good first answers</li> <li>• Appropriate support for multilingual content</li> <li>• Appropriate control of quality of content, both writing and technical quality</li> </ul>	<ul style="list-style-type: none"> <li>• Track ease of identifying and retrieving appropriate content.</li> <li>• Track how well tool clearly defines and controls content quality.</li> <li>• Verify that tool has secondary devices that facilitate writers’ ability to plan and tailor their writing such content templates, style guides, and conventions.</li> <li>• Determine what percentage of knowledge exists in ready-to-use syntax.</li> <li>• Identify how much time and what level of technical expertise the tool needs to maintain knowledge management system: is tool proprietary and dependant on vendor for support?</li> </ul>

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	<ul style="list-style-type: none"> <li>• Security: Access control, need to know; enable team role of partners and subcontractors; network security; VPN; permissions</li> <li>• Extent to which management can use and verify metrics</li> <li>• Extent to which tool requires technical support for knowledge management system.</li> </ul>	
<p>Leveraging online data/art repositories (BAE)</p>	<ul style="list-style-type: none"> <li>• Ease of use: simplicity, accuracy, and set-up</li> <li>• Graphics feature fit               <ul style="list-style-type: none"> <li>– Search and retrieve</li> <li>– Graphics capabilities</li> <li>– Integration with other elements</li> <li>– Cross linking of text and graphics</li> <li>– Other TBD</li> </ul> </li> <li>• Past Performance Data feature fit               <ul style="list-style-type: none"> <li>– Ability to generate a potential bid team list by matching work requirements to past performance data</li> <li>– Capabilities matrix from past performance data</li> </ul> </li> <li>• Update and use of resumes</li> <li>• Subject Matter Experts – How to Identify SMEs and Capture Content that Humans Have</li> <li>• Security: Access control, need to know; enable team role of partners and subcontractors; network security; VPN; permissions</li> <li>• Extent to which management can use metrics</li> </ul>	<ul style="list-style-type: none"> <li>• Track time and expertise needed to load, identify, and retrieve appropriate graphics and data.</li> <li>• Verify that tool has secondary devices that facilitate graphic artist' and/or writers' ability to tailor response to appropriate themes.</li> </ul>

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	<ul style="list-style-type: none"> <li>• and verification</li> </ul>	
Facilitating document layout and assembly	<ul style="list-style-type: none"> <li>• Extent that tool effectively automates style and layout features</li> <li>• Extent that tool provides layout and design assistance</li> <li>• Integration of text and graphics support</li> <li>• Ability to track attachments, graphics and tables</li> <li>• Support for production: reproduction, burning of disks, indexing, presentations</li> <li>• Use tool as a staging area, an enabler of assembly</li> </ul>	<ul style="list-style-type: none"> <li>• Record what secondary devices tool has that facilitate converting draft material to final copy.</li> <li>• Record time and level of expertise needed to use those secondary devices.</li> </ul>
Mapping pricing and solution configuration	<ul style="list-style-type: none"> <li>• Ability to provide support for configuration management and pricing support</li> </ul>	<ul style="list-style-type: none"> <li>• Clear demonstration of relationship between bid requirements and configuration and price build up</li> </ul>
Training Proposal Teams to use Automation Tools		<ul style="list-style-type: none"> <li>• Identify how much time and what level of technical expertise the tool needs to maintain system: is tool proprietary and dependant on vendor for support?</li> <li>• Determine if vendor will conduct pilot project at minimal cost before tool is purchased.</li> </ul>
Integrating CRM	<ul style="list-style-type: none"> <li>• Ability of tool to serve before bid as a repository or portal for check-in and out of docs, e.g., with Govt.</li> <li>• Ability of tool to serve after bid in handling</li> </ul>	

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Strategy / Theme Management	<p>contracts and other continuing contact devices</p> <ul style="list-style-type: none"> <li>• Ability to incorporate pre-proposal strategies, discriminators, etc. into the proposal plan</li> <li>• Ability to instigate ongoing reviews of competitive information to ensure that themes are truly winning ones</li> <li>• Ability to track customer input from meetings, questions</li> </ul>	<ul style="list-style-type: none"> <li>• Determine how well tool incorporates customer input in the proposal plan</li> </ul>