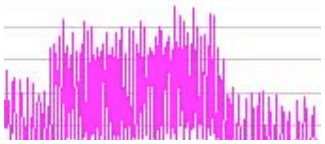
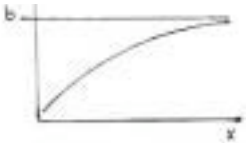
The C&H Approach to Integrated Capture/Proposal Reviews

Planning and Executing a Cost-Effective,
Coordinated Sequence of Reviews
Over the Capture Life Cycle that
Provides Consistent,
Easy-to-Follow Guidance



Usual Review Process
Breakage



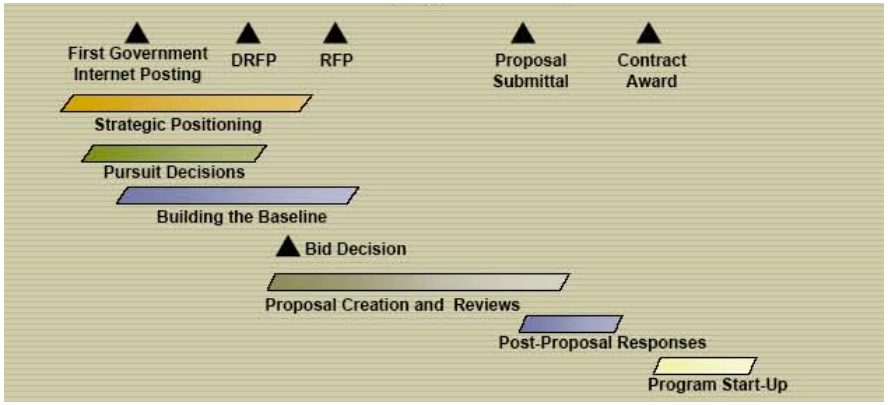
C&H Review Process
Continuous Improvement

Colbaugh & Heinsheimer Consulting, Inc.
801 Deep Valley Drive
Rolling Hills Estates, CA 90274
Phone: 310 377-9862
Fax 310 377-9863
Website: www.col-heins.com

C&H Works With Clients Over the Capture Life Cycle

Colbaugh & Heinsheimer
the strategic view

- We provide consulting services to commercial and government clients
  - With flexibility and responsiveness
  - Within each client's culture
  - Fitting each client's budget
  - Built on extensive experience in successful proposal development



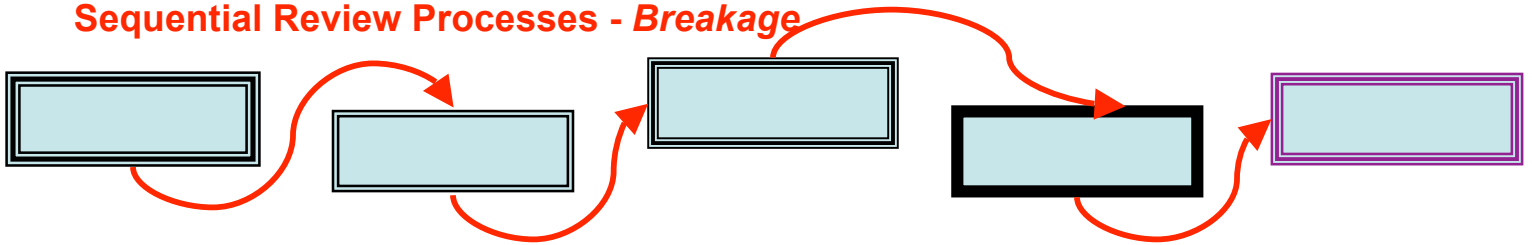
- We assist clients to capture major procurements by:
  - Supplying proposal professionals to complement the client's capture team
  - **An integrated approach to the proposal review process that smoothly connects each step to maximize Pwin and minimize B&P**

This briefing describes our review management approach

C&H Approach Changes the Review Paradigm

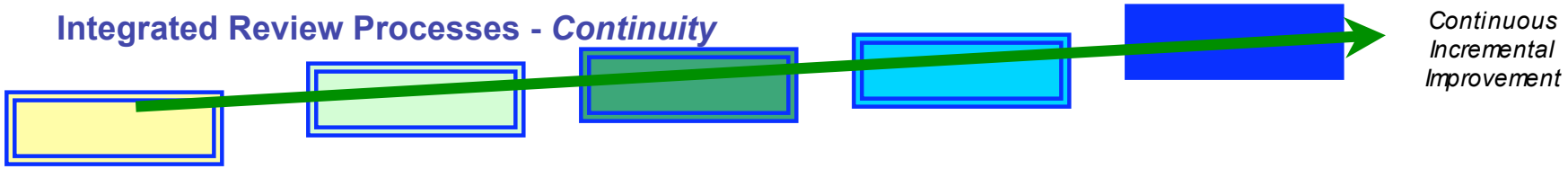
Colbaugh & Heinsheimer
the strategic view

Sequential Review Processes - *Breakage*



- Historically, the review process was managed "one review at a time"
  - Each review (black, gold, pink, red,…) had its own purpose, leadership, process
  - Subsequent reviews didn't build upon previous review products
  - Reviewers lost sight of the underlying win strategy
  - Costly breakage and re-work occurred from one review to the next

Integrated Review Processes - *Continuity*



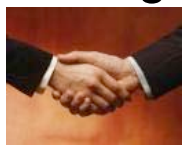
- C&H organizes and manages reviews as a continuum
  - Reviews have coordinated purposes, leadership, processes
  - Each review adds value to earlier reviews
  - The review teams are focused on implementing the win strategy
  - Quality is incrementally built in -- without costly and painful rework

Integrated reviews reduce costs, improve effectiveness, flow the win strategy into everything seen by the evaluators

Two-Person Team Manages the Integrated Review Process

Colbaugh & Heinsheimer
the strategic view

- ✓ The end-to-end review process is managed by a 2-person team
  - ✓ Client's single point of contact
  - ✓ C&H review process expert



Consistent Review Process Leadership

- ✓ At the start, they formulate the review plan to meet program needs
  - ✓ Objectives, content, duration
  - ✓ Schedules vs. milestones
  - ✓ Processes, templates and documentation
  - ✓ Membership mixes continuity and freshness
- ✓ They coordinate and supervise all reviews
- ✓ They evaluate reviews against formal criteria
  - ✓ Use feedback from all participants
  - ✓ Make improvements to the process
  - ✓ Identify shortfalls and corrective actions

Responsive Review Team Membership

End-to-end review management authority ensures review continuity

Benefits of the Approach

Colbaugh & Heinsheimer
the strategic view

"One at a Time" Review Approach

- Win Strategy and Capture Plan may match corporate culture more than RFP
- Strategy and Plan not formally enforced with resources and milestones
- Proposal team often "knows what customer really wants -- they told us so"
- Reviews cost too much and whipsaw the proposal team

X Teams are too big, reviews take too long, reviewers are often clueless about previous reviews, don't do their homework, apply their own biases, tend towards pomposity, and make recommendations that are long-winded, confusing and contradictory

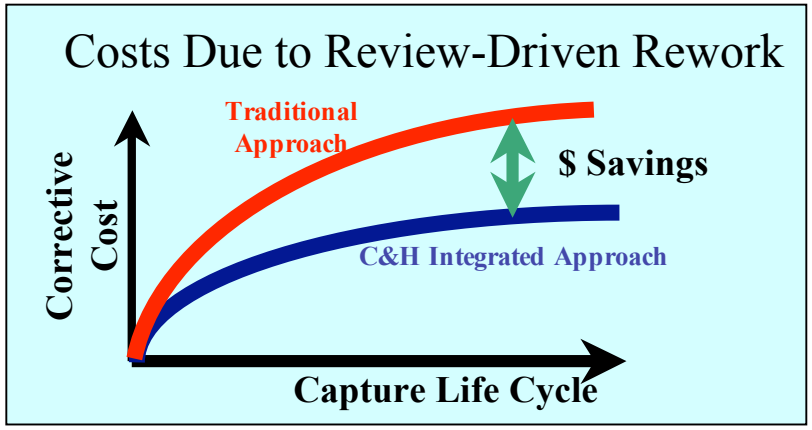
C&H Integrated Approach

✓ Shakes out parochialism and identifies customers' needs

✓ Formally evaluates actions and progress towards executing win strategy

✓ Keeps team focused on formal evaluation criteria (Section M)

✓ Each review is short, relevant, well organized, with informed reviewers and actionable recommendations



Integrated approach reduces costs, improves effectiveness, flows the win strategy into everything seen by the evaluators

Integrated Approach Delivers Timely Insight

Colbaugh & Heinsheimer
the strategic view

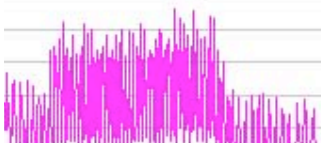
- **IS IT REAL - Analyze Procurement**
  - ✓ Customer identification (organization, influencers, authorities, authorizers)
  - ✓ Customer assessment (funding factors, hopes, fears, and biases)
- **IS IT WORTH IT - Review Business Case**
  - ✓ Fit within corporate strategic business plan objectives
  - ✓ Bid cost, profit goals, R&D investment, and risks
- **CAN WE WIN - Assess Competition and Our Win Strategy**
  - ✓ Shape the procurement / customer contact plan
  - ✓ Competitors' strengths and weaknesses
  - ✓ Win Strategy and implementation plan
  - ✓ Teaming for strategic composite strength
  - ✓ Concurrent marketing actions (ad campaign, trade shows, …..)
- **IS THE PROPOSAL A WINNER - Review at Each Step Builds on Earlier Reviews**
  - ✓ Pre- DRFP -- Strategy, competitive assessment,
  - ✓ Post-DRFP/RFP -- Outline, story map, mock-ups, drafts, final, orals, BAFO

The approach keeps reviews focused on the critical issues

Integrated Reviews Summary

Colbaugh & Heinsheimer
the strategic view

- ✓ Review management authority is clear and consistent
  - ✓ Two person team runs process over capture life cycle
- ✓ Review teams have continuity of knowledge
  - ✓ "Insiders" have knowledge of client culture and technology
  - ✓ "Outsiders" have objectivity and broad programmatic experience
- ✓ Proposal team knows what to expect
  - ✓ Outputs build upon previous reviews
  - ✓ Guidance is aligned with win strategy
  - ✓ Team kept focused on RFP compliance and discriminators
- ✓ Reviews are fast and painless as possible
  - ✓ Out-briefs are clear and actionable
  - ✓ Consistency of approach minimizes costly re-work



Usual Review Process
Breakage

C&H Review Process
Continuous Improvement