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# IMPROVING PROPOSAL RESPONSES: TIPS FROM A BUYER IN THE TRENCHES



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Presented by



## **OVERVIEW**

The ideas and recommendations contained in these writings are designed to address questions selling organizations have had over the years regarding how to best navigate within the local government procurement arena. Most of the information addressed suggests ways to approach a Request for Proposal (RFP); however, there are many areas that are applicable to Request for Bids as well.

This write-up consists of five topics, and it is not designed to be a comprehensive look at the proposal process but rather be an idea generator for those interested in how an insider of the buying organization – who understands what happens when proposals are received and evaluated – might approach RFPs.

The ideas and suggestions put forth by the author are opinions formed by a Purchasing/Supply Chain career spanning almost four decades, including both private industry and government purchasing.

# INTRODUCTION

First, what is a proposal? Each effective “proposal,” in the experience of the author, is a focused marketing document designed to demonstrate why the proposing organization (i.e., seller) is the superior business partner to be selected for this specific opportunity. In order to accomplish this objective, there should be a narrative that builds the case consistently throughout the document.

Request for Proposals (RFPs) and Request for Bids (RFBs) or Invitation to Bid (ITBs) are not the same. Ultimately, RFPs differ from RFBs in two important areas: (1) RFPs attempt to measure the levels of the proposing organization’s competencies as identified in the solicitation criteria and not simply qualify all bidders as acceptable against a standard; and (2) an RFP is subject to negotiation.

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**1**

## Ensure Requirement Clarity: Maximize the Use of the Question & Answer Period

Consistently successful proposals are developed by sellers confident that they are addressing the real problem. One way to truly understand the buying customer’s problem is to maximize the use of the formal question and answer period. The Q&A period is called out in most RFP’s schedule of major events, but it remains an underutilized opportunity that is seldomly used effectively.

### **CONE OF SILENCE**

Once an RFP has been issued and is “on the street,” there typically is “a cone of silence” around the buying organization, which forbids discussions with potential proposing organizations to ensure equal access and equal information during the proposal process. The Q&A period is typically the only opportunity where it is acceptable for the seller to interact with the buying organization.

## **UNDERSTANDING IS AVAILABLE FOR THE ASKING**

Understanding the RFP early in the process can lead to questions that are crafted to effectively engage the customer. By providing the information needed for the buyer's consideration, the seller should be careful to not give away information that would tip their hand for anything unique that they might want to protect for competitive advantage. Most importantly, well-crafted questions can lead to ensuring the proposing organization understands the customer's actual concerns and, thus, understands the opportunity.

## **BETTER UNDERSTANDING = BETTER OPPORTUNITY**

A better understanding of the scope of work leads to more specific proposals, more accurate technical evaluations, and more comparable pricing, which is what most proposing organizations want. Therefore, all stakeholders are served well when sellers know what the customer actually needs and wants. And, there is only one sure way to understand what needs to be addressed... ask!

## **2**

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## **Don't Wait for RFPs – Good Things Happen for Those that Hustle While They Wait**

### **GET TO KNOW THE BUYING ORGANIZATION**

Strategic organizations cope with having too many opportunities by selectively targeting prospective customers. They continuously update their market data and align the organization to respond to RFPs it has targeted. They strategically pick the customers they wish to do business with (see also Section #3 - Pick Your Battlegrounds) and focus on what it takes to win those opportunities. Successfully targeting customers involves getting to know them, including their:

- Current situation,
- Future plans,
- Budget,
- Current provider (along with their satisfaction level),
- Current pricing and terms (by requesting a copy of the current contract),
- Timing, and
- Unique worldview and as it affects how they see each specific opportunity.

## **BUILD AN OPPORTUNITY ASSESSMENT DATABASE**

Determining what opportunities might arise can be supplemented by utilizing public information. Some customers have information on their website, including scheduled timeframes for routine requirements based on contract expirations. Others' websites are designed to allow searches that can provide official award documentation that was provided to the governing body as well as copies of the signed agreements. Interested organizations can request copies of the government customer's current contracts for the work that is of interest. Signed contracts and amendments provide important information, like the:

- Name of the current contract holder,
- Length of the contract,
- Current price being paid,
- Current scope of work and/or technical specification(s), and
- Contract terms and conditions.

## **MAINTAIN REFERENCE RELATIONSHIPS AND KEEP CONTACT INFORMATION CURRENT**

Knowledgeable and positive references make a tremendous difference when the buying organization seeks to validate claims made in a proposal. Make it easy on the buying organization by providing contact information that is up-to-date. Include information that establishes the nature of the relationship and its relevance to the project at hand. Also, make sure to explain the role of each reference (at the time) and why it is relevant to the current proposal.

## **CREATE A CATALOG OF WINNING PROPOSALS**

Many government buying organizations utilize RFPs that were developed by others for similar requirements. The propensity of government buyers to utilize other agencies' RFPs is a more recent practice and has had the de facto effect of standardizing portions of the qualification, evaluation requirements and work content. Thus, reviewing current RFPs from the web can place an organization ahead in understanding how others have defined the requirements and the evaluation criteria. Additionally, requesting copies of winning proposals from buying organizations will allow sellers to see how others have addressed the criteria. In either event, having taken the time so see how other Buyers and Sellers are addressing the topic(s) will certainly expand an organizations perspective and may even lead to a breakthrough solution.

## **KEEP UP WITH A CHANGING MARKET**

Continuously updating market data by tracking the timing and results of RFPs from the general market as well as from targeted customers may reveal:

- Current pricing, & Competitive lead-times,
  - Technical solutions currently offered by the competition, and
  - New competitors in the marketplace.
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## **Pick Your Battlegrounds – to Propose or Not to Propose, that is the Question**

To propose or not to propose, this is a critically important question. Proposal prioritization and the ability to know when to politely and professionally decline an opportunity are important and underrated proposal management practices. Focusing resources on best-fit opportunities can dramatically improve a seller's probabilities of producing winning proposals. Conversely, exceeding organizational capacity in an attempt to respond to nearly every RFP issued can stress and overload those responsible for the unique content required for effective submissions; resulting in a lack of proposal continuity and outright mistakes.

## **EXPERIENCE: THE BUYER TAKES IT SERIOUSLY, SO YOU SHOULD TOO**

Since meeting an RFP's defined qualification requirements is a prerequisite for consideration, experience should be one area of particular interest for organizations considering responding to a government solicitation. Proposing organizations that do not meet the experience criteria typically receive little consideration. Thus, organizations lacking in experience should consider either requesting a change to or clarification of the requirement during the Q&A time period (see also Section #1 above).

## **ONE WINNER**

The odds of winning an RFP are not even, so responding to many RFPs as if it were a numbers game is not an effective strategy. Proposals that do not meet the requirements or represent the best that an organization can deliver are unlikely to yield many wins, if any at all. Quality wins out over the number of submissions made.

## **FOLLOW A SUBMISSION CHECKLIST OR CONTENT MANAGEMENT MASTER**

A submission checklist or Content Management Master is a listing of every requirement contained in the solicitation: listing each document, technical requirements, evaluation criteria, schedule, and any unusual risks. The checklist also lists assigned individuals' responsibilities.

This purpose of the checklist is to:

1. Assess if the organization is qualified, willing and able to pursue the opportunity, and, if so,
2. Provides a method to ensure all requirements are assigned to subject matter experts (and track their progress) so that, ultimately, the organization's proposal is compliant with the solicitation requirements.

## **LEVERAGE A REPEATABLE MODEL FOR EVALUATING OPPORTUNITIES**

Generally, a decision to propose involves the following components:

1. Strategic Fit: being able to meet the requirements as defined in the selection or evaluation criteria and in the statement of work or specifications;
2. Reasonable alignment with the customer's predisposition to a particular solution;
3. A favorable competitive landscape: assessing potential to win in the niche that the work resides;
4. Positive customer relationship: technical and service credibility;
5. Adequate time to produce a potentially winning proposal; and
6. An acceptable risk profile.

Successful selling organizations know when to undertake writing a proposal to compete for the opportunity or when to provide a "no bid" letter indicating that it will not be responding to the opportunity. To improve the chances of responding in the future, the correspondence should provide feedback as to why the opportunity was not pursued.

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## 4 Write to Your Audience – Evaluators are Typically Sailors, Seldom Ship Builders

### FIRST THINGS FIRST

Before the writing begins, establish the intention of the proposal. The narrative of the proposal must clearly demonstrate that the customer's issues are understood and that the most effective solution for this specific customer need is best achieved by utilizing the proposing organization's unique capabilities. The best proposals read as if there is only one writer who truly understands the problem, is exceptionally qualified to provide exactly what is needed for the success of the buying organization and they will be easy to work with.

### KNOW YOUR AUDIENCE

Proposal evaluators are likely not design engineers or technical experts in the technology or service they are evaluating. They are, however, likely to have a fully competent or even an advanced understanding of how to use what they are specifying. As such, they also are likely to know what they want and have definite opinions on features, performance and quality.

Evaluators understand the work primarily from their professional perspective and typically will be looking for very specific information. Thus, the proposal should be laid out in such a way that the specification or requirement is linked to the proposed solution or performance need **IN THE ORDER** it is addressed in the solicitation document. Also, be aware that there are times when different evaluators will be responsible for different sections of the proposal (i.e., the section evaluator never sees the information).

### EXTREMELY CRITICAL NOTE

Make sure that the proposal language and tone does not talk down to the evaluators. Instead, provide information and supporting documentation aimed at furthering their understanding of the product or service while linking the information provided to the performance and technical requirements.

### MAKE IT EASY FOR THE EVALUATORS

**FOLLOW THE ORDER** and use the terms contained in the solicitation. Use clear sections and headings to make it easy to locate information contained within the proposal. Evaluators must compare proposals, so making it easy to find information will allow the comparisons to be more thorough and accurate.



## MAXIMIZE THE USE OF GRAPHIC ELEMENTS

Using graphs, tables, data summaries, flowcharts, pictures and appendices will help the proposing organization to engage and keep the attention of the evaluator.

## PAGE COUNT REQUIREMENTS

Page limitations are designed to allow adequate space to address the requested information while assisting the evaluators to make a well-educated determination without being overwhelmed by wordy proposals that are not well thought through. It is the author's contention that more concise proposals demonstrate a mastery of the topic, increasing the credibility of the proposing organization and the comprehension of the proposed solution (i.e., is the information easy to find and understand?).

## MUST ADDRESS AREAS

To improve the chances to win business, a seller's proposal should effectively demonstrate the following.

- **Business is viable and capable** - the business is successful, has a practice that addresses the opportunity, and can complete the work without financial or personnel distractions
- **Expertise of the people performing the work** - the staff has adequate education, reasonable tenure, and has numerous examples of relevant experience
- **Expertise addresses the specific opportunity** - actual work examples (and not just general or unsupported statements) with excellent outcomes
- **Proposing organization sincerely understands the work from the buying organization's perspective** - the customer has a specific challenge and is unlikely to trust anyone that cannot see it the way that they do, so consider including:

● Current state of the opportunity	● Areas of project risk
● Benefits of successful completion	● Risk mitigation approaches
● Interactive Project Plan	● Return on Investment

- **Unique value proposition of the proposing organization** - why select your organization (the importance of differentiation cannot be overstated).

## **MAXIMIZE THE IMPACT OF THE PROPOSAL**

The proposing organization has only one opportunity to make a good impression for each specific solicitation. An evaluator's overall perception and proposal scoring can be negatively affected by minor errors. Conversely, well-organized and error-free proposals might have the opposite effect, resulting in higher scores. This reaction to the proposal content is known as the halo effect (or halo bias) and can potentially help a proposing organization that creates and submits well-organized, accurate and clear documentation, especially in the initial sections. In such situations, the proposal scoring of subsequent sections can be a little higher than the content might support because it is riding the coattails of the initial sections.

## **BE EMPATHETIC**

Few things impress evaluators more than a direct, focused, clear and well-organized proposal that addresses topics in the order prescribed in the solicitation in such a way to demonstrate that the proposing organization truly understands the buying organization's needs and concerns. Earning the maximum possible points requires first walking a mile in the evaluator's shoes and then bridging the gap from their requirements to the proposing organization's capabilities and experience.

## **BE EARLY - SUBMIT WELL BEFORE THE DEADLINE**

Most, if not all, government buying organizations have a strict cut-off time and date. Unfortunately, too many selling organizations learn the hard way... be on-time or don't be evaluated – period. There is almost no flexibility or exceptions that allow a buying organization to accept a late proposal.

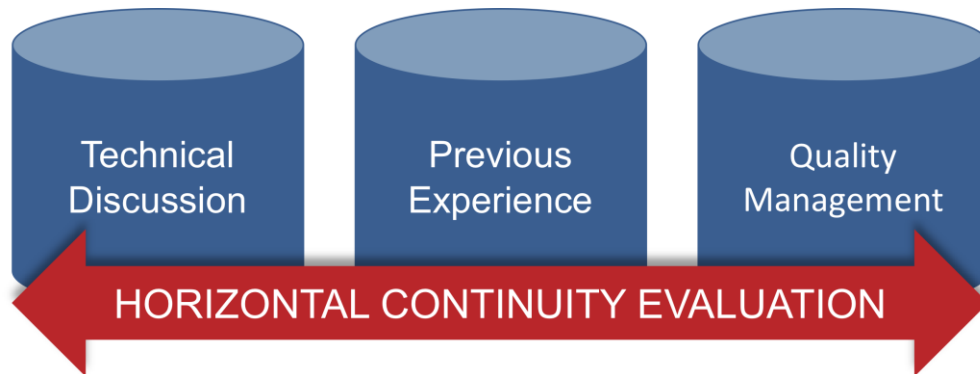
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## **QA Check – Ensure That Everything Is Addressed**

Quality checking what is essentially a custom product does not need to be an overwhelming or overly tedious process if the proposing organization should organize around the solicitation document. Using a submission checklist, content management master or a basic spreadsheet can reduce the complexity of meeting the solicitation requirements as well as managing the technical content.

## **ENSURE VERTICAL CONTENT AREAS ARE HORIZONTALLY INTEGRATED FOR THE EVALUATION**



At this point it is assumed that each subject area (or silo) in the RFP has been addressed completely with emphasis on previous successes; there should be no questions raised directly or indirectly that are not completely addressed. Even when executing within a well planned and executed strategy, responding to the different subject areas within the RFP does not always create a well-focused document. Now is the final opportunity to consider the following:

- Document voicing and flow
- Consistent use of technical terms and abbreviations
- Clarity of communicating your unique performance capabilities
- Empathetic engagement of the customer as a partner
- Strength of your conclusion

The best practice is to have a non-participant read the proposal for content, message continuity and communication effectiveness. In the model below the silos represent each subject content area while the horizontal arrow links all the subject areas in total. The horizontal integration looks at ensuring that the proposal reads as one well focused and clear document and that the hero of the story is the customer for selecting the best possible technical partner.

## ABOUT DALE JORDAN

Dale Jordan is the Procurement Director for the National Accredited Cherokee County Procurement Department since 2012. His interest in purchasing started at Florida State University College where he was inspired by a dynamic purchasing professor, Dr. Larry Giunipero, a highly respected and active leader in what would become the supply chain field.

Graduating with a B.S. in Management, with an emphasis in Purchasing and Materials Management Dale started in the aerospace industry holding a variety of purchasing roles, later turning his focus to commercial purchasing and most recently to government purchasing. Always the student as well as a practitioner, his pursuit of procurement best practices across many industries over the last thirty-eight years has resulted in broad perspectives in how supply chain challenges can be actively managed. Many of these topics have been developed into presentations, including: Supplier Selection and Management, Industry Analysis, Negotiation Strategies, Demand Consolidation and Price and Cost Analysis. While Dale obtains great satisfaction from contributing to the profession, his roles as a family member provide his greatest fulfillment. His other passion is music; attending numerous concerts, dabbling in songwriting, playing guitar and home recording, when he can keep the family French Bulldog from contributing vocals.

## ABOUT VENDOR REGISTRY

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