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GovCon101- Submitting Bids

Updated 8/13/2023

Demystifying Government Bids, & Proposals

What will we learn...

- What are they?

Are bids & proposals different?

How do I find an opportunity?

What do I do when I find one?

- What else do I need to be aware of?

So on to the demystification...

Discussion Topics...

- **Bid & Proposals, is there really a difference?**

- Quote, Estimate, Quote, Bid, and Proposal (Offer): How are they different?

- **Pipeline Development & Capture - How to Identify and “filter” Opportunities**

- Business Development or Capture – the basics
- Strategy-to-Win Development & Execution – What, why, when, how
- RFIs, Sources Sought, RFPs, RFQs, RFOs, ITOs, etc.
- Active Pipeline Management – Position yourself for success

- **Pre-Proposal Preparation**

- Baseline Development (Technical, Management, Past Performance, Price & Cost, IP) – What, why, when, how
- Proposal planning, resources, execution
 - Oral & Written Proposals – How are they different?

- **Proposals**

- General “best practice” proposal/bid approach

- **Other Topics**

- Submission
- Post submission
- Q&A

But First – An Opportunity

We define an “opportunity” as where the Government is considering / or initiating an acquisition of products or services, where industry will have an “opportunity” to compete to provide that product or service to the Government

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Bid & Proposals, is there really a difference?

General definition of terms (note, these are NOT “hard and fast”)

- **Typical terms of use:** Estimate, Quote/Bid, and Proposal...How are they different?
 - **Estimate**
 - Typically used early in the process when there are still unknown factors that will affect a final price
 - Within government processes may be used early in the government acquisition development process when they are trying to determine the final approach to the acquisition
 - Generally, a low level of detail, does not obligate either party – used for planning only
 - **Quote**
 - More of a formal estimate, with or without any formal invitation for the quote (IFQ, or RFQ)
 - Generally, a medium level of detail, may include a time element, can lock in a rate/price
 - **Bid (“formal”)**
 - More formal than an estimate and quote – in response to in “invitation to bid” (IFB, or RFB)
 - Typically, a fixed price, quantity & timing of delivery. May be used in relatively simple commodity-based product or service acquisition/purchase
 - Generally, a medium level of detail, may include a time element, can lock in a rate/price/performance
 - **Proposal (aka “offer”)**
 - More significantly more formal than a quote or bid – in response to in “RFP” (or ITO)
 - For more complex acquisitions of products or services, can be price or cost based, quantity & timing of delivery can vary
 - Generally, a high level of detail in proposal, includes a time element, locks in a rate/price/performance

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Proposals

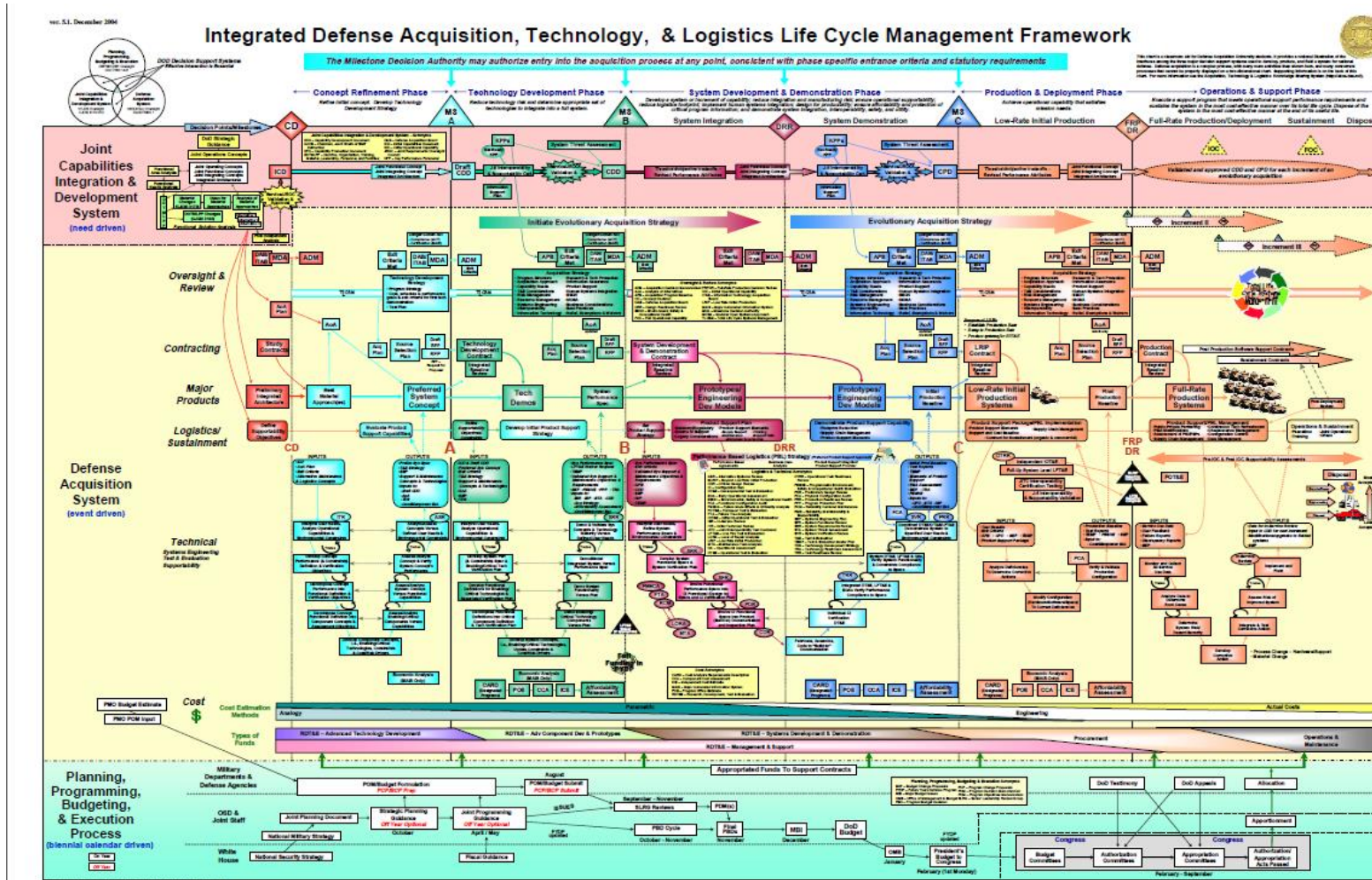
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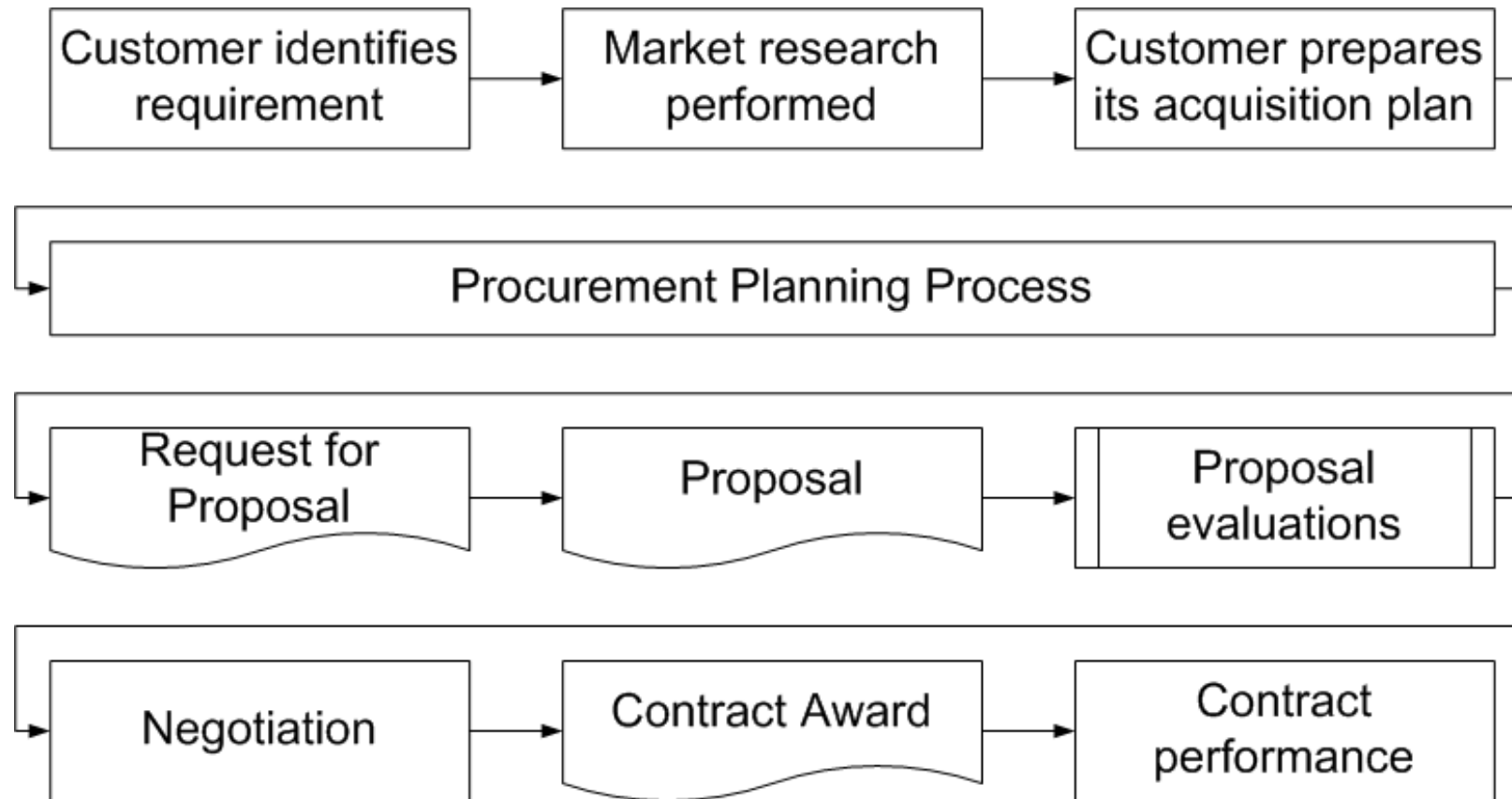
Government Acquisition Process

You may have seen this...yes but...



Government Acquisition Process

A simplified & digestible view – in general!



BD, Capture, Competition

At a high level only...

- **Focus In Your Area of Business**

- Determine Your Market (Market Analysis)
 - Where will your potential market be
 - Assess (agency level) how they buy (Acquisition Pathways, Contract Types)
 - Applicable Consortiums (and use of OTAs)

Business Development

- “Big BD”
- “Little BD” – Qualifying an opportunity for pursuit

Capture

- Qualification of your team through “shaping” yourself (NOT the Government Requirement) to become the winning contractor
 - Includes all competition activity

Business Development & Capture

How to Identify Opportunities

Pipelines of opportunities are developed and managed to achieve corporate objectives of: Revenue & Growth - - Profitability - - Risk - - Markets and offerings

- Assess the market you “want to sell into”
 - What do they want that you have?
 - What do they place value on? (Will lead to evaluation criteria)
 - Understand their mission and CONOPs

Identifying specific opportunities for pursuit

- Sourcing longest timeframe to shortest timeframe forecast:
 - Government information sources (conferences, public announcements, industry knowledge), Agency procurement forecasts, SAM.gov
- The \$\$\$ size of an opportunity generally sets how far in the future it is brought into your pipeline
 - The larger the opportunity, the further out it should be identified and brought under pipeline management
- Should be in your “sweet spot”
 - Developing capabilities in a new market space? Start out as a subcontractor, get a record of past performance
- Select efforts you know will meet your internal financial targets
 - Does the customer base want best value or best price?
 - What is that agency’s record on best value?
 - Do they have acquisition support? How may that change the outcome?
- Select the opportunities you really want to win, invest in those
 - ROI on BD funding is much better with a targeted win rate vice “sowing seeds in the fields of public acquisition”

Selection & Initial Qualification – Some typical questions to be posed – not all may have fully vetted answers initially

- Is it a fit for your delivery capability?
- Do you have a recent and relevant past performance story? If not, can you build one (in time)?
- Is it “real”?
- Is it an acceptable contract approach? If not, can it be shaped?
- Who do we have to beat to win this? Can we?
- Do we have time to “develop” the opportunity? (e.g., conduct BD & Capture)
- Does the cost to win the opportunity give us adequate return on our investment?

Capture Best Practice Approach

BD Intelligence, BD Activity, Opportunity Qualification



Analyze Customer & Program – Develop Strategy-to-win

(Single Cycle)

BD Intelligence & Constant Update ➤ *BD Activity (With Customer)* ➤ *Qualify Opportunity* ➤ *Develop Initial Strategy* ➤ *Customer Collaboration*

Execute Strategy-to-win – Define / Refine Offering

(Multiple Cycles)

Competitive Position ➤ *PTW* ➤ *Offering Development* ➤ *Past Performance* ➤ *Black Hat* ➤ *Customer Collaboration*

Prepare for the Proposal

(Single Cycle)

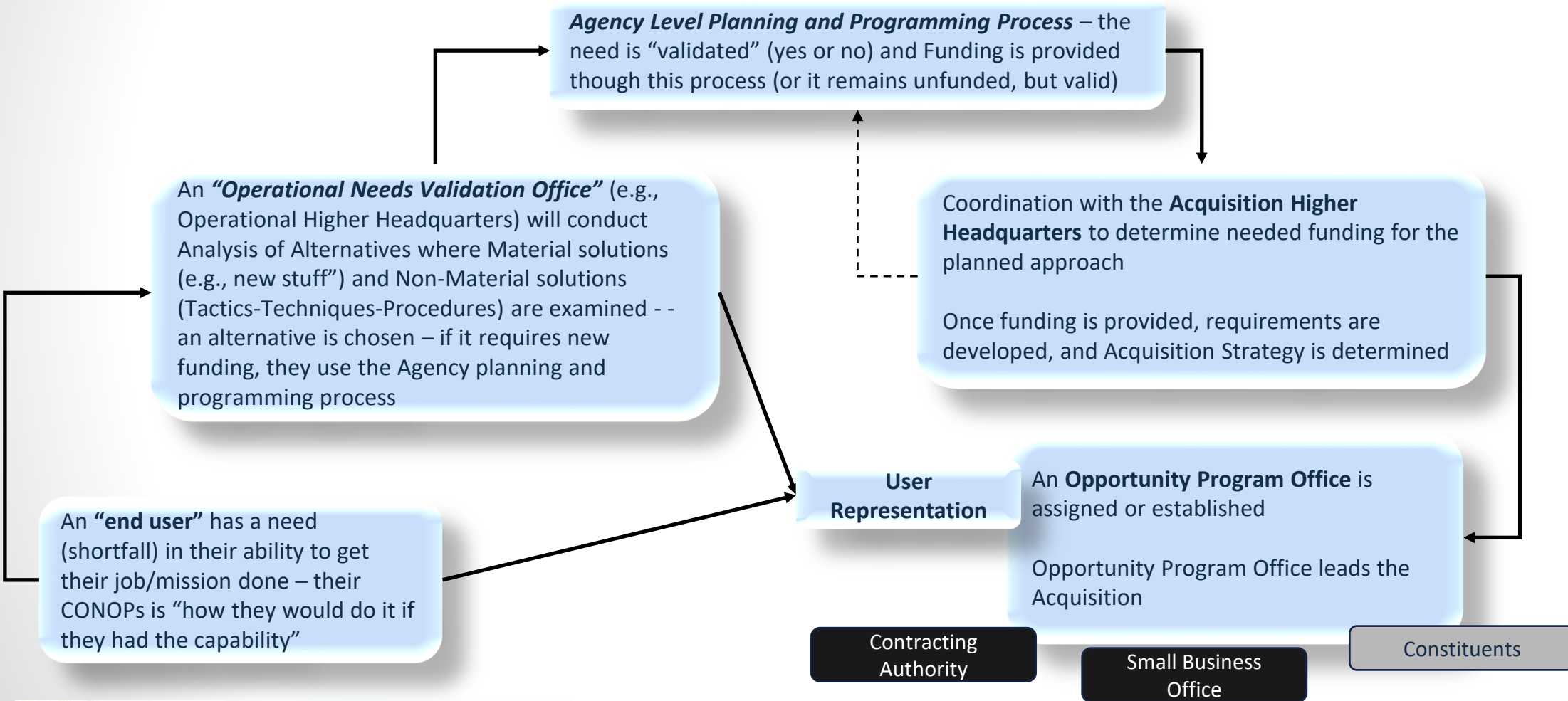
Define Proposal Baselines ➤ *Plan Proposal* ➤ *Proposal Readiness Review* ➤ *Monitor Opportunity for Change*

RFP



Pre-Qualify Pipeline

Business Development Intelligence on Opportunity needs and influencers



Pre-Qualify Pipeline

Initial Best Practice BD Intelligence Package Outline

Package should be based on best data available initially, updated during the campaign

Executive Summary

- Opportunity
- Government Program Needs
- Competitor Profile
- Market/Customer Strategy
- Acquisition Milestones & BD Actions

Users and Shortfall, CONOPS, Operational Needs Office

- Users and Need
- CONOPS
- Operational Needs Office

Acquisition Strategy and Opportunity Program Office

- Acquisition Strategy and Programmatic Data
- Opportunity Program Office
- Contracting Office

Competitor Profiles

- Corporate Overview and Organization
- Offering & Capabilities
- Past Performance
- Protest/Audit Reports
- News

BD Planning Tools & Templates

- Relationship Map
- Power Map
- Call Plan
- Next Steps Plan
 - Acquisition Milestones and BD Actions to Be Accomplished
 - Key Risks to be Mitigated
 - Call Plan Desired Outcomes

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RFP

“Little BD” – Fully Qualifying for Pursuit

• Fully qualifying for pursuit - objectives

- Fully answer (clearing all unknowns) the previous group of initial qualification questions
 - Is it a fit for your delivery capability?
 - Do you have a recent and relevant past performance story? If not, can you build one (in time)?
 - Is it “real”?
 - Is it an acceptable contract approach? If not, can it be shaped?
 - Who do we have to beat to win this? Can we?
 - Do we have time to “develop” the opportunity? (e.g., conduct BD & Capture)
 - Does the cost to win the opportunity give us adequate return on our investment?
- Develop an understanding of the acquisition, the competition, what it will take to win. Initially answer, can you get there?
 - Back to previous Market Analysis discussions
- Establish contact & a professional relationship with the Government

• Do your homework before you plan to see the Government

- Make sure you fully understand the Government need, program office(s), acquisition approach and milestones, and competition
 - This is before you go meet the Government the first time!

• Then, go see the Government – talk to them

Meeting With The Government

Your objective in meeting with the Government

- Thoroughly understand their needs, problems, concerns
- Help the Government inform their own expectations by their full understanding industry's capabilities and limitations, as well as advantages and shortfalls
 - This is where the phrase “shaping the acquisition” comes from...
- What is their “dream team?” – “dream solution?”

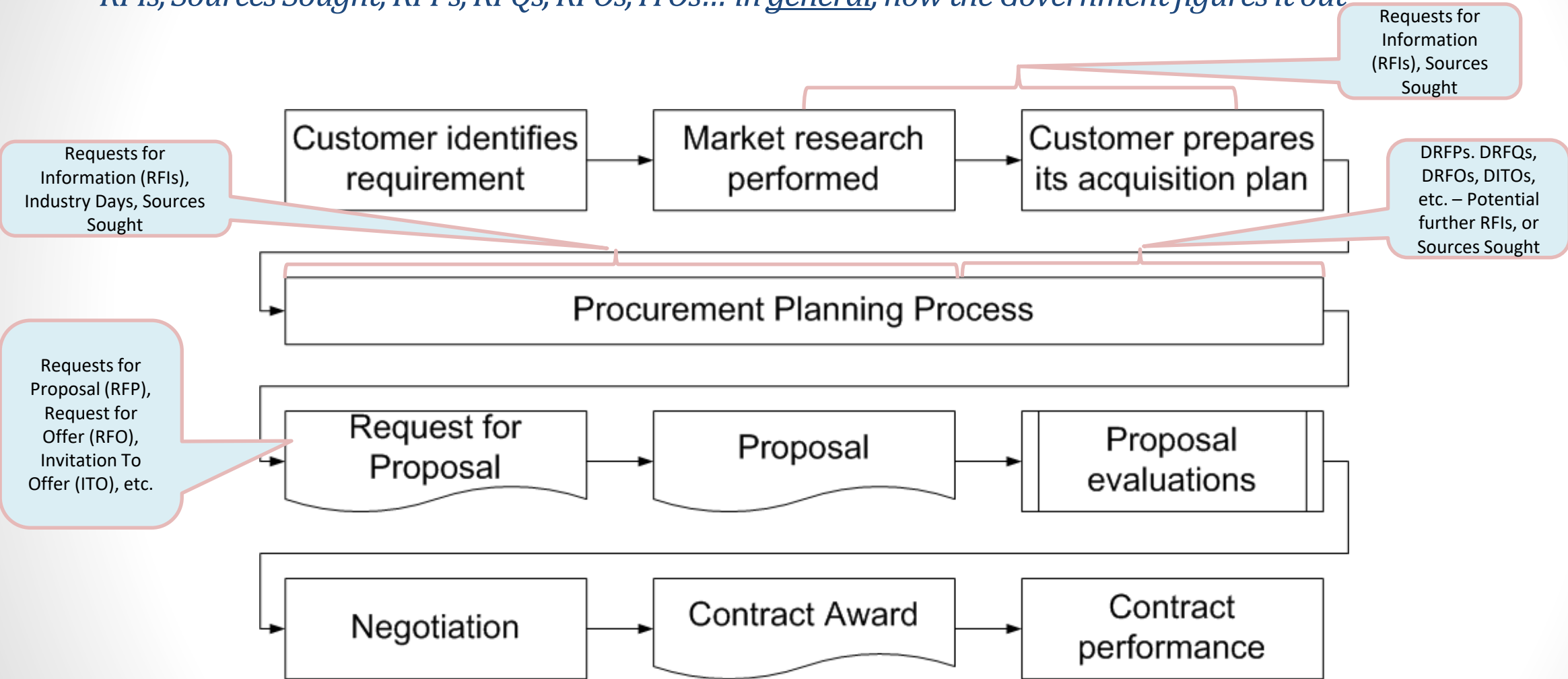
Do not show up “selling” - - show up with knowledge and ready to listen...practice your visit

- Know their strategic plan, operational needs, and requirements
- Know who you are talking to
 - Who are they? What is their current role? What is their history?
- Be armed with what you think “keeps them awake at night” – make sure they get to talk
 - Steer the conversation - get them to talk about their concerns, confirm or correct your perceptions
 - What are their big challenges? Where do they need help?
- Help them “gently and credibly ” understand what you have to offer via your understanding of their needs, and your offers to assist - This is not a “shiny generic marketing slick”
- Walk in with a desired outcomes in mind (e.g., offer to help)
 - Set up meetings with your existing/former customers dealing with similar issues; offer white papers (these can help clarify issues/solution approach, but they must be balanced)

• Over a series of focused meetings, you help the Government turn you into a winning contractor...this is the real shaping

Government Acquisition Process

RFIs, Sources Sought, RFPs, RFQs, RFOs, ITOs...“in general, how the Government figures it out”



Responding to Sources Sought, RFIs, White Papers, etc.

Sources Sought, Requests for Information, Request for White Papers

- These are all mechanisms the Government uses to determine what capabilities industry has, what limitations industry has, and help inform the Government of how they can ask for what best meets their needs
- Take them seriously! (As you would a proposal)
- Sources sought, generally are considered as a mechanism the Government uses to decide if there is adequate small business capability (“e.g., “rule of two”) to consider a SB set aside
 - Not always, can also be done with RFIs

This is your chance to communicate with the Government about what industry can do, and what industry limits may be

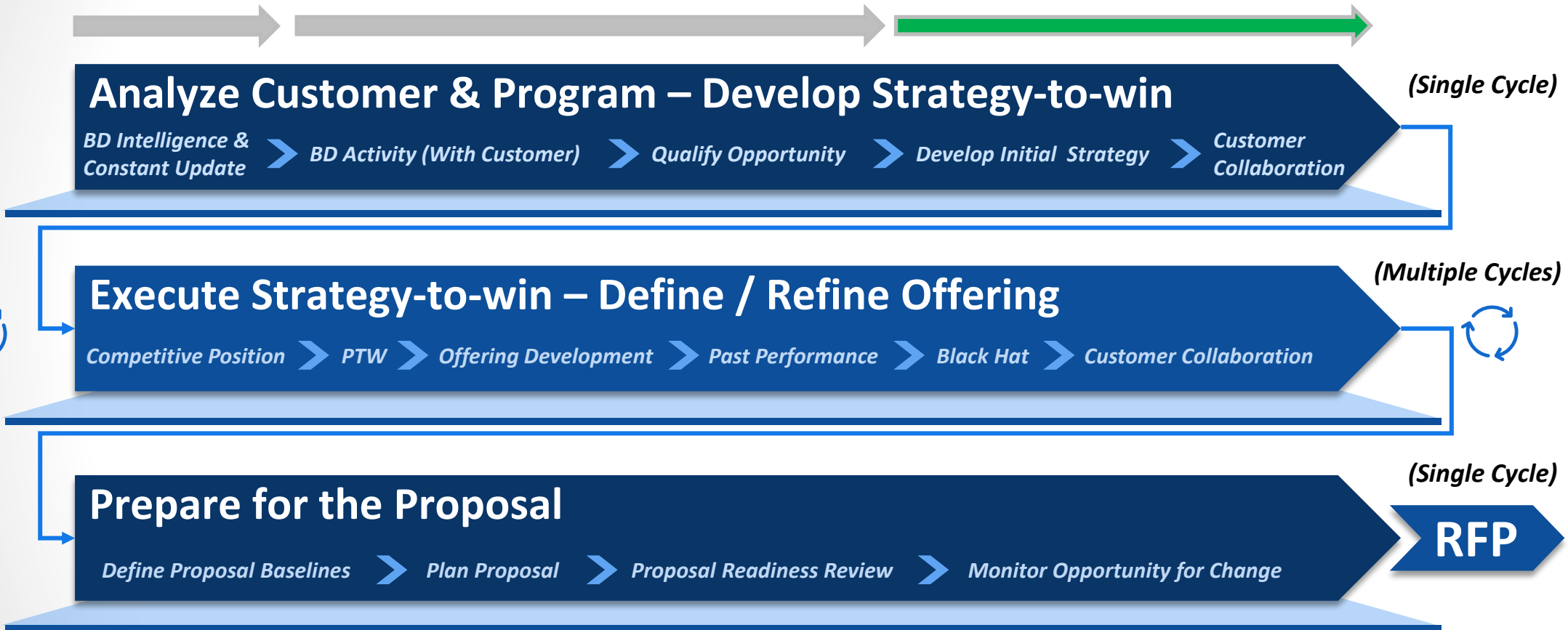
- This is your true opportunity to “shape” the acquisition
- You must remember the Government’s purpose here – Is this something industry can do?
 - Can industry do it, they are NOT deciding yet who will do it. But they are seeing if there is a competitive base out in industry that can build the product, or accomplish the service

Answer the mail! (Answer their questions specifically following their instructions.)

- Focus on answering what has been asked, not that you have the “best” among like competitors. They will give you that opportunity in the RFP stage
- Nearly every time the Government will ask for your ideas on how they might do it better. But again, stay focused and answer the mail.
 - Good quality answers may create follow up opportunities, e.g., may have an industry day follow on with “one on ones”

Capture Best Practice Approach

Transition to Capture



Strategy-to-Win - The Five Key Elements

Scope limited discussion

Enterprise – Who we need to be

- Overarching infrastructure that links the prime contractor (and all of its parts), the team members, and the customer(s)
- Created to meet program objectives, exploit team strengths, and eliminates critical team weaknesses

Organization – What we need to look like

- The way the delivery team is structured, the capabilities of its personnel, the commonality of tools and processes, the distribution of authority and incentives, and the team-wide communications (including Governance)

Solution Architecture – What we need to do

- Processes, people, and tools used to make fundamental decisions, balancing evolving program objectives and risks - mission, technical, cost, schedule
- The way in which the customer participates in this process and has insight into the decision-making process (critical)

Program Plan – What, and when are we going to do it

- The cost driven plan and schedule (IMP/IMS) to meet program objectives, provide program flexibility, mitigate risk, and apply lessons learned

The Deal – The business solution, beyond what is required

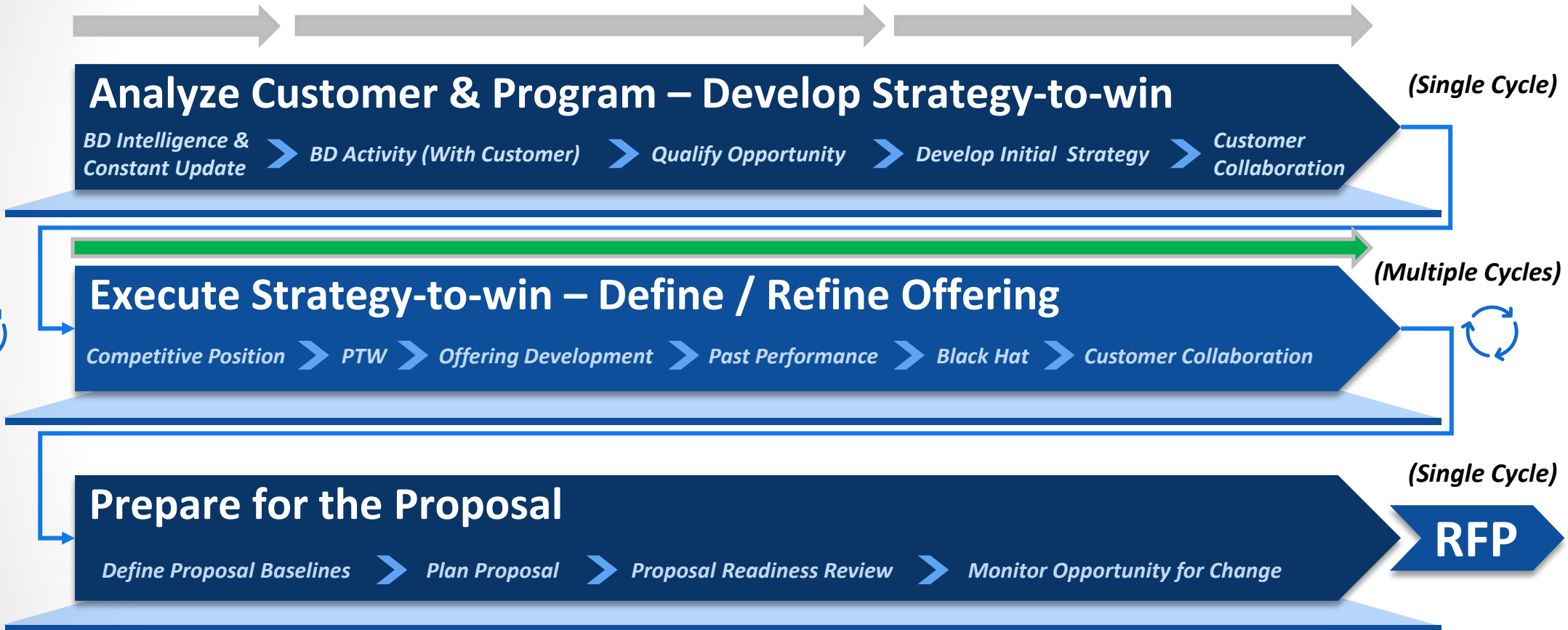
- The total financial relationship with the government, over the program life cycle, that meets government fiscal objectives, and minimizes their fiscal risk

THEN – Collaborate With The Customer – get them to help you refine it!

- You will be updating your Strategy to Win periodically through the Capture
 - Requirements often change throughout the whitepaper and later phases of the potential OTA award process - track these changes and respond accordingly to ensure responsiveness
 - If it is a Production OTA, if follow-on production work is anticipated as part of the procurement objective and available via sole source methods, contractors should position themselves to ensure such work is explicitly stated in the RFP to avoid a sustainable protest

Capture Best Practice Approach

Capture



Artifacts Created By The Capture Team For The Proposal Team

Scope Limited Discussion

Capture & Contact Plan

Opportunity Description

Customer Insight

- Goal-issue-impact-benefit question baselines
- Question/discussion documentation
- Customer leave behinds
- Customer baselines
- Customer intelligence documents and library

Competitive Assessment

Offering

Teaming Strategy

Price-to-Win & Business Case

Strategy-to-Win & Action Plan

Resources & Staffing

Political Plan

Summary & Recommendations

Proposal Plan

Completed Proposal Baselines

Proposal Resource Plans & Estimates

- Schedule
- Core Team
- Author & SME Team
- Facilities
- Schedule
- Costs

Contingency Plans

Differentiators

Win Themes

Active Pipeline Management

Positioning yourself for success

- **Pipeline Management**
 - An Executive management process revisiting each opportunity on a recurring basis
 - As it moves closer to the RFP release date, more “BD & Capture” items must be accomplished successfully
 - Key to success: **Killing an opportunity that is not moving toward BD and Capture goals as needed**

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Baselines

Why & what...

- Aspirational (like the Strategy-to-Win)
 - It captures what we ASPIRE to deliver on the program, even if we are not positioned to deliver them today
- Gather information and create strategies and approaches we usually say “if we had time” we would do
- Create the ability to focus on “selling” not “solving” after proposal kick-off
- Have entire team on the same “sheet of music”
- Executive management approval of approach early in the process avoiding later rework
- Maintain momentum and enthusiasm of team generated during RFI and Black Hat Review / Strategy-to-Win sessions

Baseline Solution areas

Requirement Baseline

Organizational Baseline

Management Baseline

Solution Baseline

Business Baseline

Past Performance Baseline

Special Topics

Executive Summary, Risk Assessment, Legal/Contracts, Orals & Demo, etc.

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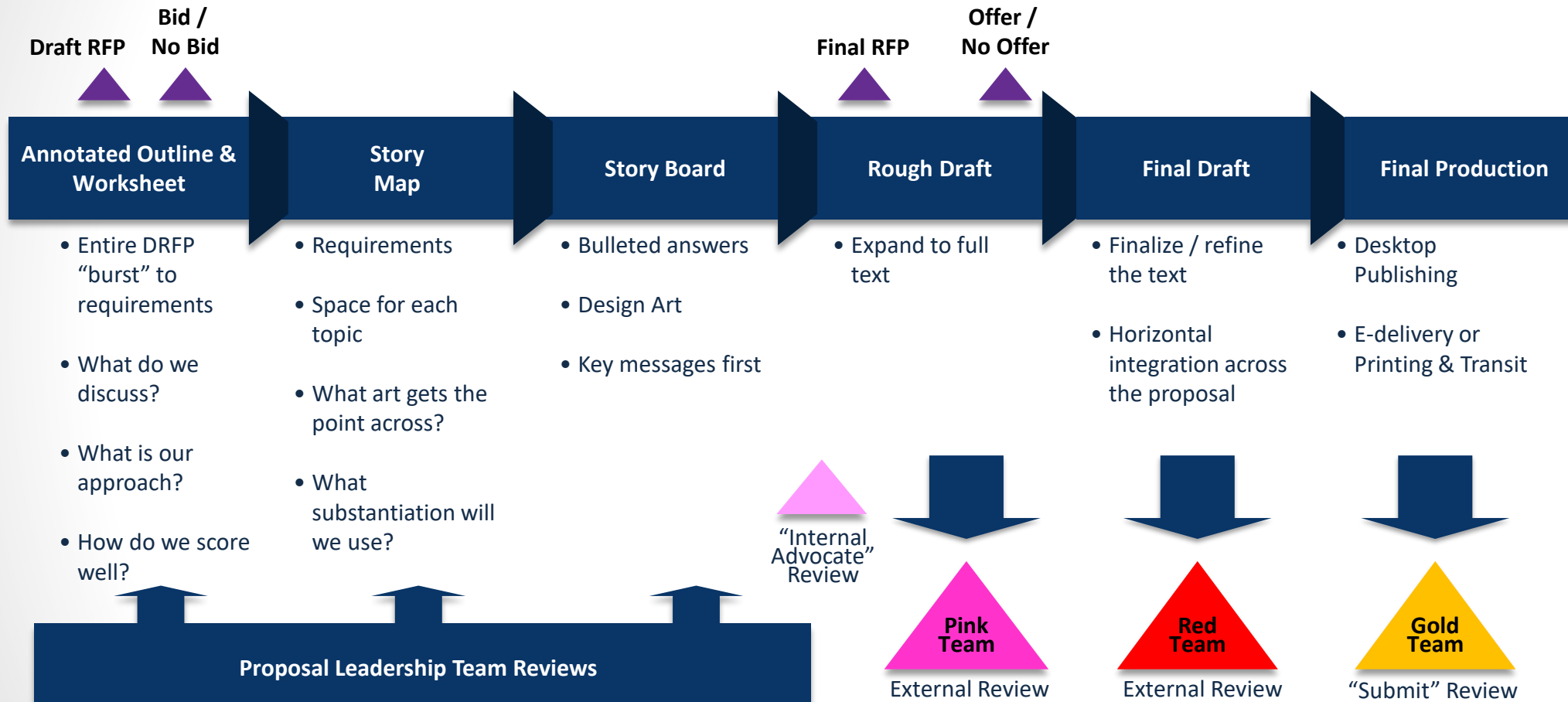
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Proposal Leadership & Development Best Practice Approach – Details Beyond Scope Today (Separate PCI Class)



Technical, Management, Past Performance

Show an Understanding of Government Requirements

- How will the system/capability perform its intended mission or task
 - From the buyer perspective not the vendor
 - Focus on the mission served, then on the capabilities needed
 - Do not confuse capabilities needed with the solution you want to sell
- Key operational functions and features
 - Again, from the buyer not the vendor point of view

Aligning Organizational Structure to Buyer Expectations

- Depends on the importance to the customer, can be critical to less so
- Do you have the organizational structure that “connects” to the customer organization to make managing the OTA execution “easy”
 - WBS represents a GAO best practice

Program Management

- WBS and WBS dictionary; (Program) Risk Management; Program Management Office; Facilities; HR; Key Personnel

Solution/Technical

- **Demonstrate understanding** of Government Requirements
 - How will the system/capability perform its intended mission or task
 - From the buyer not the vendor point of view
 - Focus on the mission served, then on the capabilities needed (not what you want to sell)
 - Key operational functions and features
 - Again, from the buyer not the vendor point of view
- Now: “Add a column” to show your key solution elements
 - Row for row, add solution, features, proofs and benefits
 - Must answer - Why is this solution better? (so what?)

Price & Cost

- Beyond scope of today's GovCon 101 1-hour (separate PCI class)

Oral & Written Type Proposals

Orals Versus Written Proposals

- Same “trends” as in FAR based proposals – no specific identifiable trends we see beyond “it depends”
- Always take it seriously
 - Can be Written only (most)
 - Can be both written and orals
 - Can be Orals only
- Best Practices for Orals
 - Same as with the proposal – **Requirement-Feature-Proof-Benefit** (this is NOT a marketing opportunity)
 - Be careful of a major teammate who starts with “we don’t need to practice; we do this all the time...”
 - Goes doubly for demonstrations
 - You can lose here too...

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Submission

- **100% Complete & On-time**– everything completed as specified in the Proposal Instruction & FAR (as applicable)
 - Includes such things as online certifications (SAM.gov) , etc.
 - Proposal Instructions customer questionnaires (e.g., past performance)
- **100% Compliant** (RFP Section L Proposal Instructions)
 - Proposal construct follows RFP Section L exactly – and in order
- **Compelling** (RFP Section M Evaluation Criteria)
 - Answers Section L requirements with specific data needed to for the Government understand and measure what, how, who, why, when (Requirements-Features-Proofs-Benefits)
 - Enable the Government to aware you strengths and significant strengths (measure and proven solution approach)
- **Responsive** (RFP Section C: SOO, SOW, PWS, PBS, TRD, etc.)
 - Answer within technical proposal all Section C items required per Section L & M
 - Price in 100% of Section C (not just what is asked to be described in Section L)
- Be cautious of turning in your proposal early...e.g., you finish 1 week early, should you submit early? (Cautions if you do.)

Post Submission

- In addition to previous discussion on Oral Proposals
- Evaluation Notices – Expect them! Plan for them! Be ready for them!

Summary: Demystifying Government Bids, & Proposals

What did we learn...

- What are they?

Are bids & proposals different?

How do I find an opportunity?

- What do I do when I find one?

- What else do I need to be aware of?

Q&A

3 Poll questions
Then Open Q&A

Contacts

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