

The Proposal Is Your Project

In high performance A/E organizations, project management is the key to success. Without strong project management staff, systems, and support in place, an organization can fall apart. After all, project managers are the “front-line” of the organization with three major responsibilities—get the work; manage the work; and bill the work. Every other function in the organization exists to support the project managers in each of these efforts.

As marketers, we’re on the front-line of the first of those three responsibilities—getting the work. When we work with an organization that emphasizes good project management as the key to project success, we tout this as a major selling point for our team.

In the majority of proposals we write, we describe our project approach. We explain to our clients how we manage projects, and how our process will achieve successful results.

We talk about identifying goals and objectives, defining a scope of work, and developing and adhering to schedules and budgets. We emphasize our understanding of the importance of good communication and project

management. In short, we laud our “process.”

When it comes time to write the proposal, that process often becomes chaos: goals and objectives aren’t clear, responsibilities are undefined, schedules are loose with few firm milestones (other than the due date), and no one is accountable for the process.

Significant changes are made mid-stream by someone who was unavailable for (or just unfocused during) early planning stages and everyone panics. The proposal team works late nights and long weekends just before the proposal is due.

I worked on a few proposals like this. And then it occurred to me—if we can successfully manage projects using good project management principles, then why shouldn’t we manage proposals using those same techniques? With strong proposal management staff and systems in place, we can function at a higher level and improve the success of our proposals.

If you typically manage the proposal process at your firm, you are the “project manager” for the proposal, and your “client” is the internal principal or technical professional in your organization who will be signing the cover letter.

If you want the process to go more smoothly, you need to take charge. Let everyone know that your job is to prepare the best possible proposal. To do that, you need to make the proposal process run smoothly for everyone involved.

Although a formal project approach may not be practical for every proposal, consider using the following strategy:

1. Hold a kick-off meeting to establish goals and objectives.
2. Negotiate your scope of work, schedule, and resources.
3. Manage the proposal process with good communication.
4. Close-out the project and debrief.

Hold a Kick-Off Meeting to Establish Goals and Objectives

Meet with your internal client and define the goals and objectives of the proposal. What are the key issues? What are your team’s strengths? What opportunities and constraints do you see for the proposal process? What are your competitors’ strengths and weaknesses?

Discuss your understanding of the proposal, and your internal client’s understanding of the proposal. Make assignments for any needed research (call the external client with questions; obtain copies of relevant documents; visit the project site).

Identify the tasks required to achieve the goals and objectives of the proposal and prioritize them. Once refined, this list of tasks becomes the table of contents for the proposal.

Negotiate Your Scope of Work, Schedule, and Resources

Clearly defining the proposal process up-front is the most important step. Using the table of contents as a guide, define your responsibilities, as well as

If you want the process to go more smoothly, you need to take charge.



those of your staff and your internal client.

Develop a proposal team—think of the organization chart you include in proposals to give your external clients an understanding of responsibilities—your proposal process needs one, too. In this case, you are the top center box, as the “project manager” for the proposal.

You will have “task managers” reporting to you on various portions of the proposal (such as graphics, text, staff resumes, project sheets, special client needs, production, and delivery), and you report to the internal client. Make sure you designate someone as responsible for reviewing and assuring the proposal’s quality. Map out a schedule for completing each task. Determine the critical path for completing the proposal and emphasize accountability in meeting the schedule. Make sure you have adequate time for quality assurance and production.

Define the resources you need—marketing staff, technical staff, graphics, and other special materials. Clearly understand the level of effort necessary to complete the proposal, and make sure that the staff assigned to your proposal process have the skills and availability required. Identify back-up resources to call upon, if necessary.

Once you have reached agreement on scope, schedule, and resources, your notes from these meetings become the contract. You now have “authorization to proceed.”

Manage the Proposal Process With Good Communication

Communicate the scope of work and schedule to the proposal team—your

marketing staff, the marketing staff of other firms on your team, technical staff, and production staff.

Keep your internal client informed throughout the process, and monitor the schedule and level of effort closely. If a change in scope is required, negotiate a change order to include schedule and resource changes, shift responsibilities between you and your internal client, or consider bringing in additional resources.

Present the project to your internal client at milestones in the schedule. Establish a quality control process and stick to it. Present the proposal to your internal client before final production and quickly respond to any “punchlist” items.

Good communication throughout the process will ensure that there are no big surprises the day before the proposal is due. Make sure you have enough production time built into your schedule, and have back-up resources for the copier that breaks down the day the proposal is due.

Don’t assume that a courier service will go to all lengths to deliver the proposal. The process is not complete until the external client receives the proposal—on time.

Close-Out the Project and Debrief

Once you deliver the proposal to the external client, review the success of your process with your team and your internal client.

Did your team meet all the scheduled milestones?

Did your initial estimate of resources hold true?

Were there challenges that could be addressed differently next time?

Be willing to learn from each proposal process. Understand that each proposal and internal client (like every project and external client) is unique. Although you may use the same approach to managing the process, you have to remain flexible and respond creatively to the needs of both clients—internal and external.

The Proposal Is Your Project—Manage It With a Winning Attitude

Remember this: if you are the one selected to manage a proposal for your organization, then your internal client already sees you as the “winning team” for the proposal process.

With a winning attitude, you can instill confidence in your internal client and keep your team enthusiastic. With good systems in place, integrating technical staff into the process should be easier and can enhance your firm’s attitude about marketing. Your hit-rate should also increase.

By successfully managing the proposal process, you can establish credibility with your internal clients and they will grow to appreciate your skills and management abilities. Since your internal clients are “repeat” clients, it’s important to keep those relationships in good working order. After all, your best references will be heard around the water cooler. ■