The EXA Consulting Group

DELIVERING BUSINESS VALUE

Proposal Leadership

Contents

EXA
consulting group

DELIVERING BUSINESS VALUE

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►**The Challenges of Proposals**

►**The EXA Approach**

►**The EXA Advantage**

►**Discussion Points**

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Introduction

DELIVERING BUSINESS VALUE

► **Global experience with Canadian focus**

    ► Serving customers since 1988

► **Services**

    ► Capture Leadership

    ► Proposal Leadership

    ► Strategic Engagement

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Introduction
Clients & Participating Partners

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CASCADE aerospace
CC130 Maintenance
CC130 Avionics

D+H FINANCIAL TECHNOLOGIES. SOLUTIONS FOR PEOPLE.
Canadian Student Loan Program

Esterline
CP140 NFIMP

thyssenkrupp
Joint Support Ship

IMP GROUP
P3 Life Extension

THALES
AJISS
MEOSAR Ground Segment

Lansdowne TECHNOLOGIES INC

Shipley Canada

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Introduction
The EXA Consulting Group

DELIVERING BUSINESS VALUE

►**EXA Delivers Business Value**

   ►Delivering business value lies at the core of everything we do

   ►We build two kinds of business value:

      ► **As-needed skills and leadership**

      ► **Long-lasting business value through corporate training**

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Proposal Leadership

Introduction
The EXA Team

DELIVERING BUSINESS VALUE

Alex McPhail
President & CEO
Strategic Engagement
Capture Leadership
Proposal Leadership
Professional Development

Rick Bowes
Senior Associate
Strategic Engagement
Capture Leadership

John Fournier
Associate
Capture Leadership
Proposal Leadership

Iain Wilkes
Associate
Proposal Leadership
Engineering and Management Specialist

Strategy & Business **Specialists**

Marketing **Specialists**
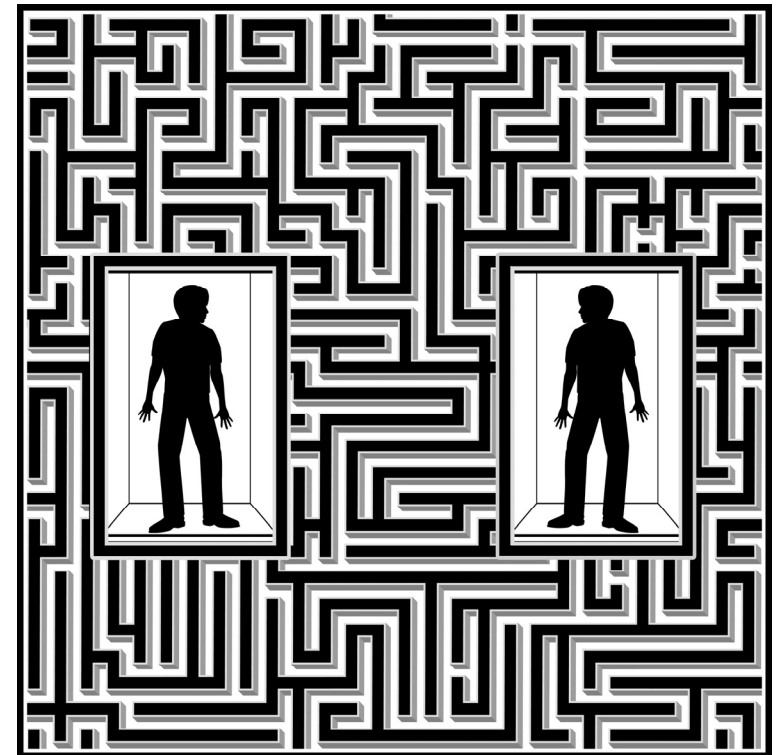
Writers & Editors

Graphics & Production

Proposal Coordinators

Reviewers & Auditors

The Challenges of Proposals

►Complexity

►Resources

►People

►Documents

►Requirements

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Complexity & Resources

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►Complexity

- ►Canadian RFPs are large and complex, and they change during the bid cycle
- ►The volume and complexity of work in a major proposal is deceptively high
- ►Too much work in not enough time → constantly on the edge of chaos

►Resources

- ►Most companies cannot afford a full-time complex proposal team
  - ► Proposal resources are selected on an ad-hoc availability basis
  - ► Most proposal writers have real jobs that don't go away
  - ► Companies lose the proposal knowledge they acquire when team members disband to their real jobs
- ►Even companies with large proposal teams suffer capacity shortfalls

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Challenges
People, Documents, and Requirements

D E L I V E R I N G   B U S I N E S S   V A L U E

► **People**
- ► Proposal writing is not the first choice of most employees
- ► Proposal writing itself is very different from most corporate communications
- ► Most employees lack the most basic proposal writing skills
- ► Employees lack career motivation

► **Documents**
- ► Large numbers of documents
  - ► **Including referenced documents from many external sources**
- ► Geographically distributed collaborative document management
  - ► **Security, access management, revision management, fail-proof**
- ► Living documents continuously change
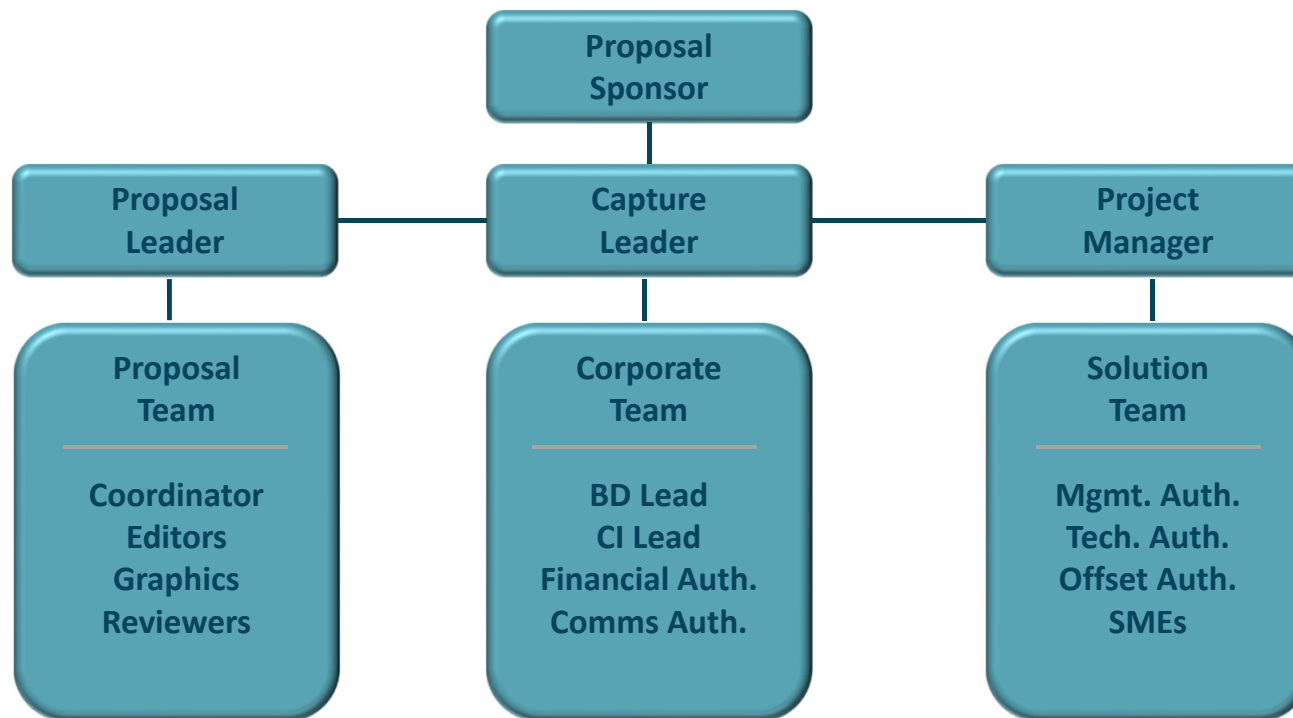 - ► **Configuration management challenge**

► **Requirements**
- ► Thousands of requirements and evaluation criteria
- ► Scattered throughout dozens or hundreds of RFP documents

Challenges
People in Theory

Proposal Sponsor

Proposal Leader

Capture Leader

Project Manager

Proposal Team

Coordinator
Editors
Graphics
Reviewers

Corporate Team

BD Lead
CI Lead
Financial Auth.
Comms Auth.

Solution Team

Mgmt. Auth.
Tech. Auth.
Offset Auth.
SMEs

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People in Reality (Ideal)

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Discipline Factor	Program & Solution Management	Proposal Development	Business Development	Commercial Capability
Leadership Roles	• **Project Manager** • **Product/Solution Authority** • **Offset Manager**	• **Proposal Leader**	• **Capture Leader**	• **Financial Manager** • **Commercial Manager**
Supporting Roles	• Product & service managers • Subject matter experts • ITB/VP Specialist	• Coordinator • Editors • Subject matter writers • Support	• Sales • Marketing	• Financial analyst • Legal advisor • Contract manager • Subcontract manager
Overall Responsibility	• Win strategy • Solution approach • Solution team & work share • Teaming integration	• Win strategy • Proposal strategy • Planning & tracking • Production • Final look & feel	• Bid strategy and planning • Corporate funding, process and gates • Competitive intelligence • Teaming and workshares	• Terms & Conditions • Teaming agreements • Pricing
Compliance Responsibility	• SOW • Evaluation Criteria • ITB/VP	• RFP • PPI • Q&A	• Overall offer and win	• RCC • Price
Proposal Content Contribution	• Overall solution • Product/service descriptions • Compliance analysis • Writing technical descriptions of who, what, where, when, how • Schedules • Level of effort estimates	• Proposal plan • Document structure • Outline, template, mock-up • Configuration management • Editing • Reviews • Production & delivery	• Executive Summary	• T&Cs • Price • Subcontracting • Commercial terms
Post Proposal Responsibility	• Contract negotiations • Lessons learned • Requests for Clarifications • Resulting contract execution	• Debrief • Lessons learned • Requests for clarifications	• Lessons learned • Pursue follow-on business	• Contract negotiations • Lessons learned • Resulting contract management

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Challenges
Documents

► **When teams located in different cities and time zones collaborate, document management quickly collapses into chaos without a robust, distributed, collaborative document management system**

- ►Uncontrolled copies
- ►Local versions
- ►Misunderstood agreements
- ►Work duplication / gaps

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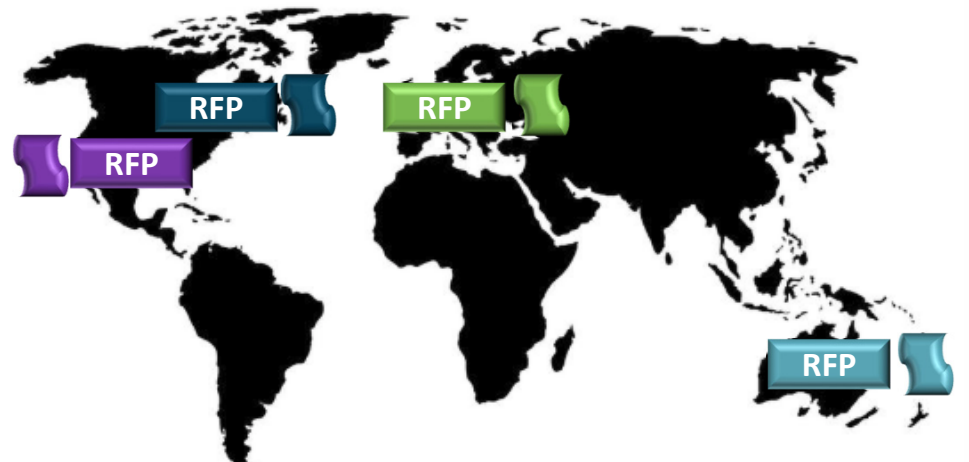
Challenges
Requirements

DELIVERING BUSINESS VALUE

| Sol |
| PPI |
| SoW |
| Eval |
| RCC |
| Q&A |

- ▶ **Sol – Solicitation**
  - ▶ High level document that forms the basis of legally binding Contract A

- ▶ **PPI – Proposal Preparation Instructions**
  - ▶ Content, structure, sequencing, labeling, formatting, media, and delivery requirements

- ▶ **SoW – Statement of Work**
  - ▶ A complete and authoritative description of all work to be performed and all deliverables to be presented under Contract B

- ▶ **Eval – Evaluation Criteria**
  - ▶ How proposals will be scored, evaluated, and selected

- ▶ **RCC – Resulting Contract Clauses**
  - ▶ A description of all elements in effect under contract

- ▶ **Q&A – Questions and Answers**
  - ▶ Questions posed by bidders and answers from the procurement agency

▶ RFP documents are constantly changing
  - ▶ Requires significant configuration management and requirements management overhead

Sol [2, 5,9]

PPI [3,6,8]

SoW [1,4,8]

Eval [2,5,6]

RCC [7]

Q&A [1-9]

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Requirements (Continued)

►**RFPs are seldomly well organized**

► Requirements are scattered throughout the various documents

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Requirements (Continued)

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► **Different people analyze and update their own copies of the RFP**

   ► Different people work on different, uncontrolled versions

   ► They decode and interpret the requirements independently

      ► Which documents are the master copies?

      ► Which requirements are the right ones?

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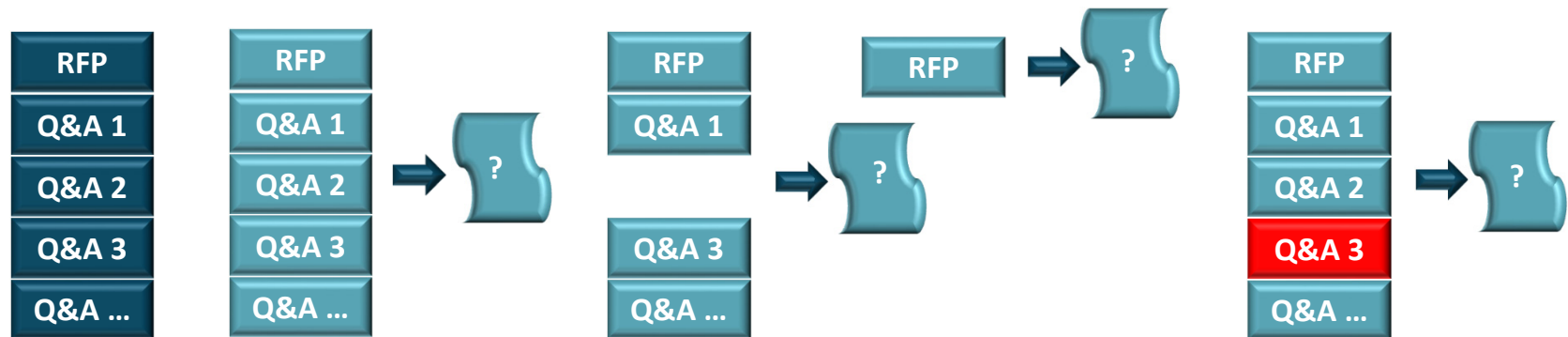
Challenges
When Deadlines Loom

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►**As bid submission deadlines grow closer, incompatible documents, difference of requirements interpretations, and solution mis-steps become more difficult to correct.**

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The EXA Approach

►**Documents**

►**Requirements**

►**Process**

►**EXA cuts through the complexity**

►**Your proposal writers
focus on manageable tasks**

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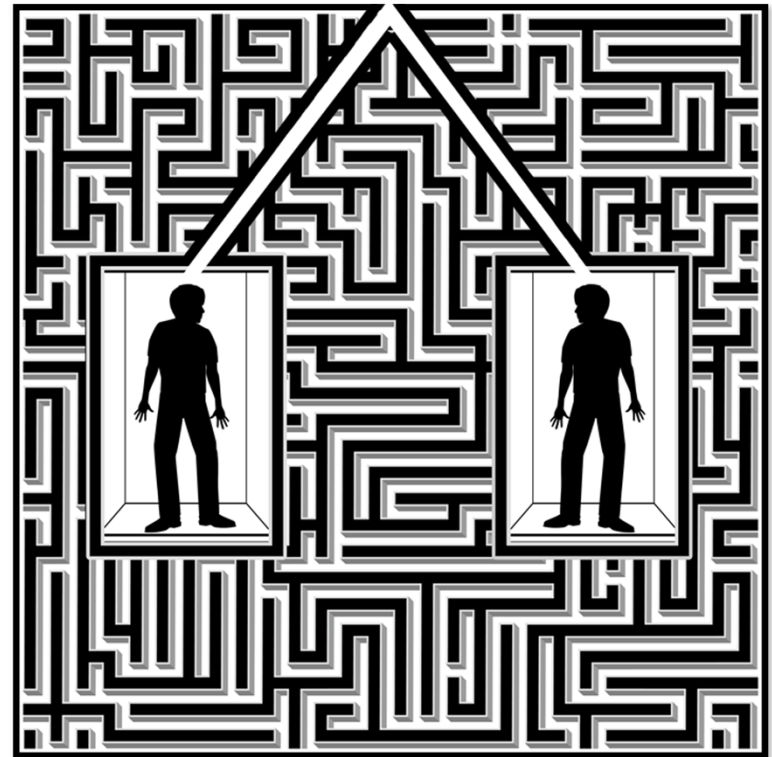
The EXA Approach
The Larger Picture

DELIVERING BUSINESS VALUE

| Strategic Goals | Market Segmentation | Opportunity Qualification | Program Pursuit | Proposal Development | Contract Negotiations | Client Engagement |

Structured

Draft RFP

Final RFP

Bid Delivery

Contract Award

Proposal Leadership

T&C Focus

Pursuit Focus

Evaluation Focus

Competitive Focus

Pursuit Focus

Pursuit Focus

Company Focus

Market Focus

Unstructured

► **Proposal Leadership dovetails into EXA's Capture Leadership practice**

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The EXA Approach
Documents

- Access Control
- Revision Control
- Configuration Management

Secure Cloud
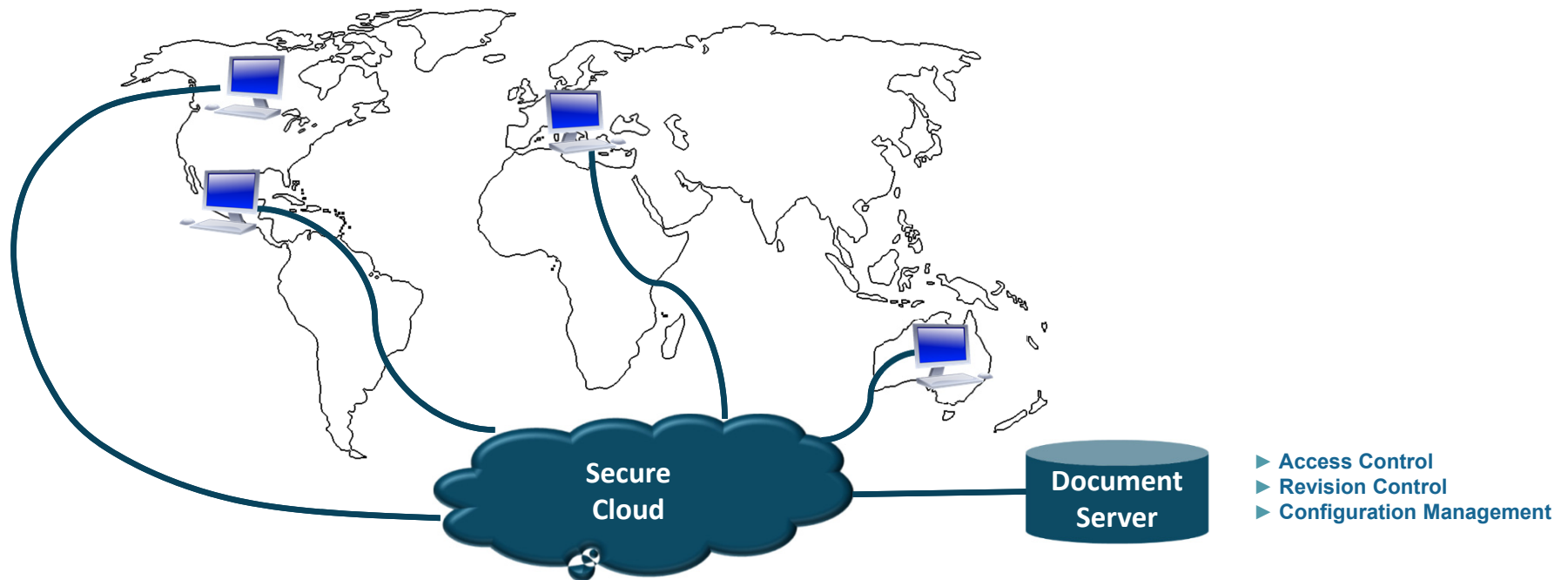
Document Server

▶ **EXA develops a distributed, collaborative, and secure document management system**

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Documents (Continued)

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► **EXA simplifies complexity by developing Master Documents**
  ► Everyone works off the same set of documents and requirements

► **PDRL** – Proposal Data Requirements List
► **ECVM** – Evaluation Criteria Verification Matrix
► **RVM** – Requirements Verification Matrix
► **Q&A DB** – Q&A and Amdendment Database

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The EXA Approach
Documents (Continued)

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► **Proposal writers work in customized templates**
  - ► Each template is fully self-contained, with all requirements and evaluation criteria
  - ► Each template maps into a specific section of the final proposal document
  - ► Writers can still reference all revision-controlled RFP and Master documents

RFP

PDRL

ECVM

RVM

Q&A DB

Proposal Ootline

Customized Templates

Author Instructions

Requirements

Compliance Statement

Response to Evaluation Criteria

Response to Statement of Work

Benefit Statement

Proposal Document

► **EXA simplifies proposal writing by breaking complex work into meaningful, self-contained tasks**

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The EXA Approach
Requirements

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Customized Templates

```
Sol

PPI

Q&A → Q&A DB → SoW          PDRL

                  Eval       ECVM

RCC                          RVM
```

Author Instructions
Requirements
Compliance Statement
Response to Evaluation Criteria
Response to Statement of Work
Benefit Statement

Proposal Document

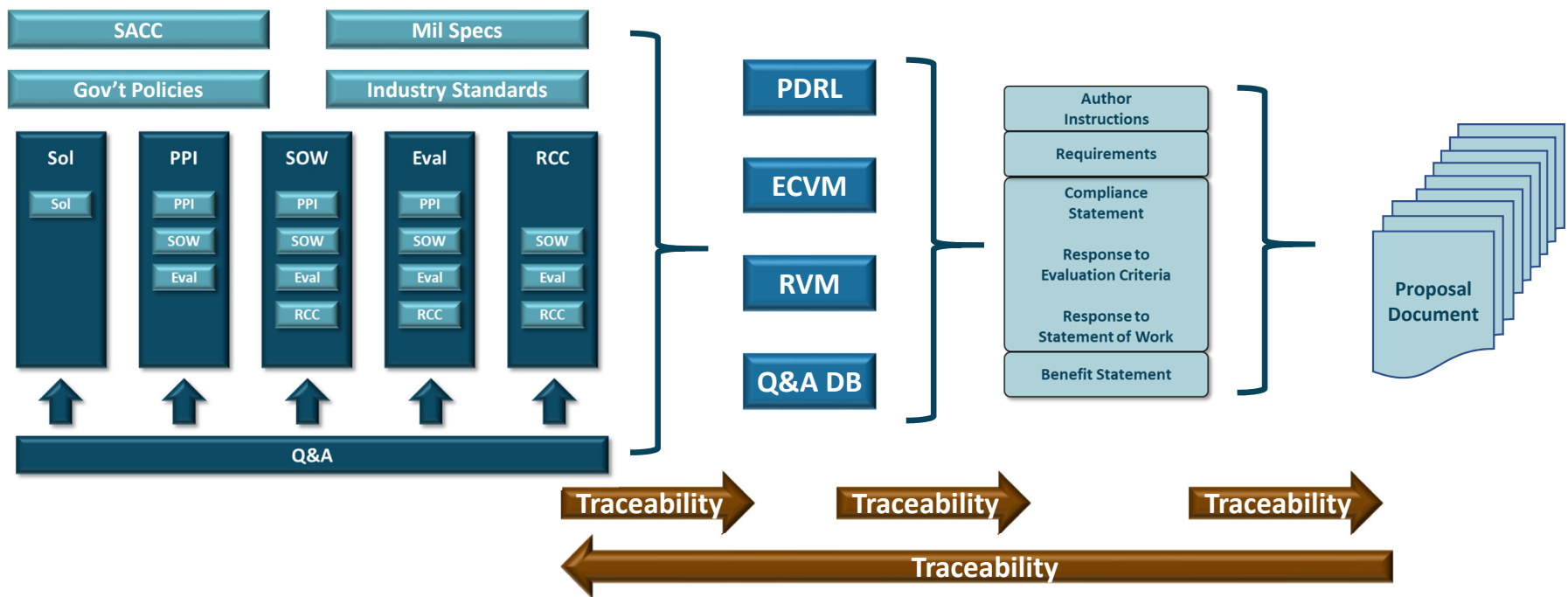► **EXA updates requirements in near-real-time**

   ► EXA's revision control system updates all master documents and affected downstream documents

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The EXA Approach
Requirements (Continued)

► **EXA tracks and traces all RFP requirements**

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The EXA Approach
Writing Process

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Infrastructure Setup > **Draft Writing** > **Formal Writing** > **Final Writing** > **Production**

Delivery

Draft RFP
Release

Final RFP
Release

Pink
Review

Red
Review

Gold
Review
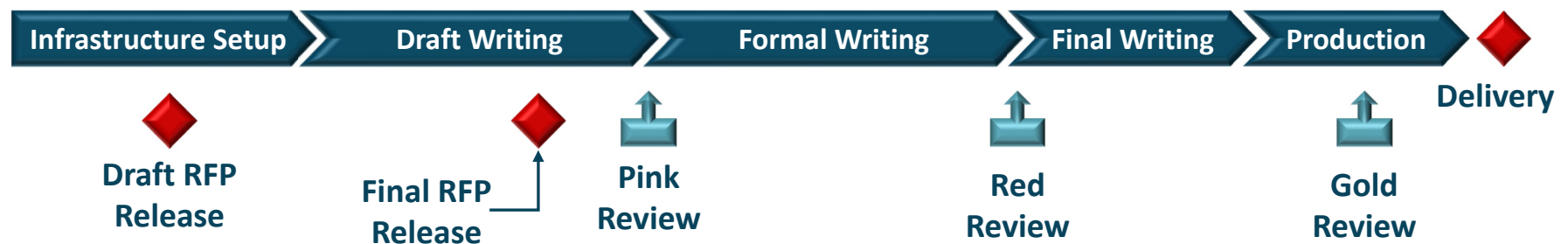
► **Draft – Templates**

► **Formal – Proposal document**

► **Final – Red team corrections**

► **EXA applies a structured writing process that minimizes mistakes and rework**
  ► Start with solution outlining and coverage
  ► Increase and refine detail
  ► Incremental reviews

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The EXA Approach
Writing Process (Continued)

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► **Compliance Statement**
  ► Short, definitive, high-level statement confirming compliance to **Evaluation Criteria** and **SOW**

► **Response to Evaluation Criteria**
  ► Detailed explanation demonstrating *how* we meet each Evaluation Criteria (**compliance**)
  ► Link response to RFP (**traceability**)
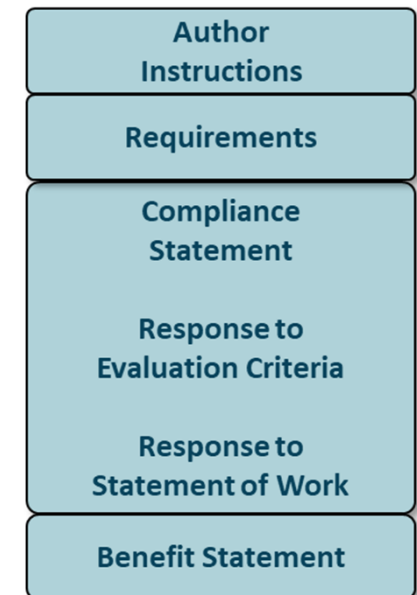
► **Response to Statement of Work**
  ► Detailed explanation of *how* we will conduct the work in accordance with the SOW (**solution**)
  ► References to past experiences demonstrating the merits of our approach (**risk**)
  ► Link response to RFP (**traceability**)

► **Benefit Statement**
  ► Summary of benefits from the customer's perspective (**relevance**)
  ► The " *So What* " statement
  ► Link to Win Themes (**discrimination**)

► **EXA simplifies and structures Proposal writing**
  ► Answer the mail
  ► Clearly demonstrate the *quality* of the proposed solution and the *benefit* to the client
  ► Make the Proposal easy to read and understand

| Author Instructions |
| Requirements |
| Compliance Statement Response to Evaluation Criteria Response to Statement of Work |
| Benefit Statement |

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The EXA Approach
The EXA VENU Win Theme Ladder

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► **VENU:**

  ► **V**erifiable
    ► Your claimed benefit must be substantiated in measurable facts

  ► **E**valuated
    ► Your claimed benefit must relate to a <u>RATED</u> evaluation criteria

  ► **N**ot cost or ITB/VP related
    ► Prices and ITB/VP are just numbers
    ► Win themes do not influence their evaluation
    ► Technical evaluations don't care about them

  ► **U**nique
    ► Your claimed benefit must set you apart from your competitors

► **EXA helps develop high-value, relevant win themes**
  ► Discriminates your solution as the superior choice
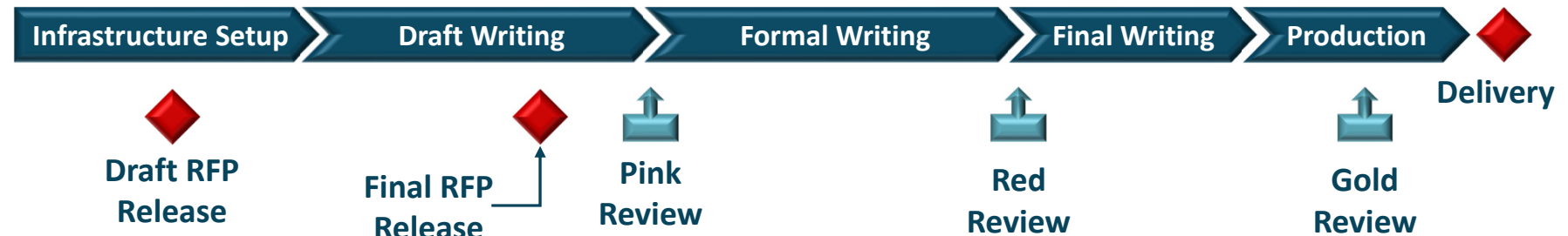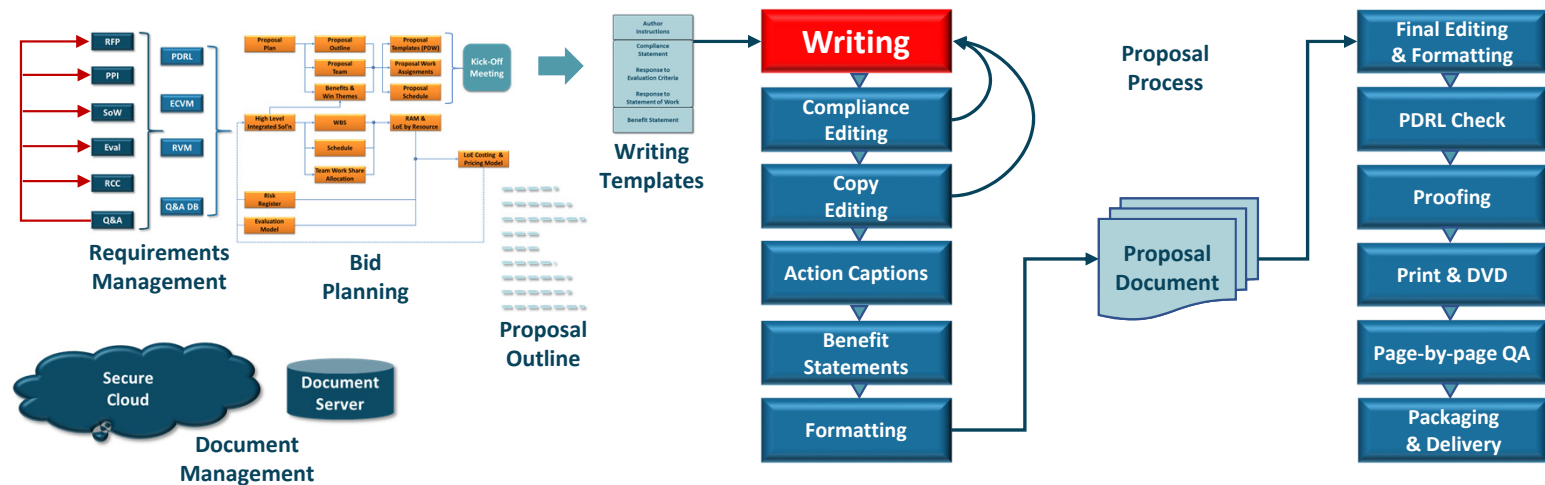 ► Maximizes the evaluated score

| Opportunity |
| Win Theme |

| Market |
| Discriminator |

| Client |
| Benefit |

| Company |
| Advantage |

| Product |
| Feature |

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The EXA Approach
EXA Manages Your Complexity

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Requirements Management

Bid Planning

Proposal Outline

Document Management

Secure Cloud

Document Server

Writing Templates

Writing

Compliance Editing

Copy Editing

Action Captions

Benefit Statements

Formatting

Proposal Process

Proposal Document

Final Editing & Formatting

PDRL Check

Proofing

Print & DVD

Page-by-page QA

Packaging & Delivery

| Infrastructure Setup | Draft Writing | Formal Writing | Final Writing | Production | Delivery |

Draft RFP Release

Final RFP Release

Pink Review

Red Review

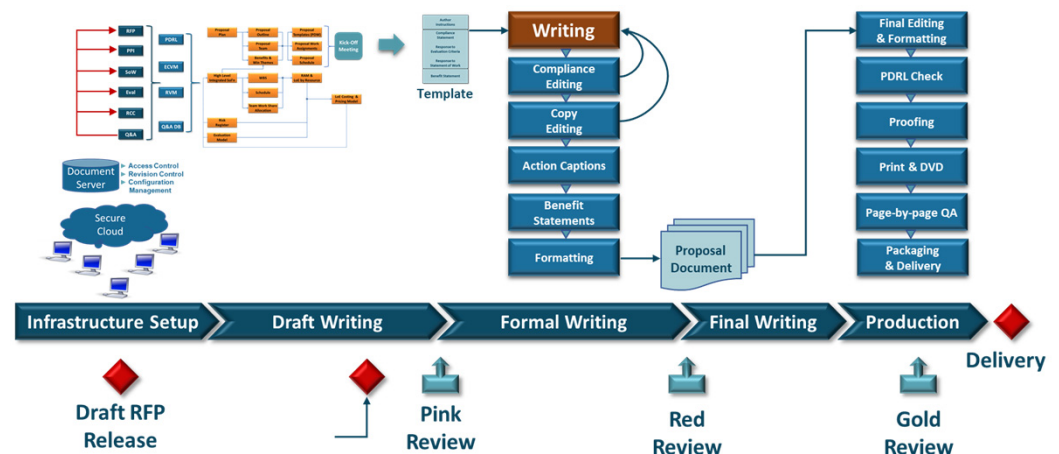Gold Review

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Top 3 Proposal Writing Mistakes

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1. **Not Answering the Mail**
2. **Not Answering the Mail**
3. **Not Answering the Mail**

►**Everything Else**

►**EXA works with your people to submit the highest quality proposal**

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The EXA Advantage

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► **Structured, organized, disciped approach to complex proposals**
  - ► 25 years of success
  - ► Access to extensive IP

► **Focus on the win**
  - ► Constantly challenge assumptions
  - ► Recursively refine the solution based on evaluation criteria priorities
  - ► Deliver the winning proposal, not the perfect proposal

► **Results**
  - ► P3 Mid-life upgrade - $500M
  - ► CC130 OWSM (PAV + AVS) – Over $1B
  - ► AJISS Support – Over $5B
  - ► CSLP - $500M

► **EXA Delivers a proven bid management process**

  - ► Proven Methods

  - ► Winning Attitude

  - ► Experience

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The EXA Advantage
Specialized Areas

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►**Technical and Management**

►**Financial**

►**ITB/VP**

► **Complex Proposal Leadership**

► **Proposal coordination**

► **Writing**

► **Editing**

► **Graphics**

► **Layout, organization, style, look & feel**

► **Printing, production, delivery**

► **Management & engineering support and analysis**

► **Complex evaluation modelling with ' *what-if* ' analysis**

► **Financial modelling**

► **Price-to-win**

► **ITB/VP**

►**EXA is the single solution for all your Proposal needs**

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The EXA Advantage
People

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►**EXA augments your proposal team with skilled and experienced professionals**

- ►Proposal Manager
- ►Proposal Coordinator
- ►Editors
- ►Writers
- ►Subject Matter Experts
- ►Graphic Artists (Desktop Publishers)
- ►Reviewers

►**EXA provides skilled and experienced people who help develop and deliver the winning proposal**

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The EXA Advantage
Skills

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►**Learn from the Experts**

- ►Expand upon your corporate Proposal Development capability
- ►Apply the EXA proven process
- ►Develop critical skills
- ►Follow-up one-on-one sessions let you apply principles in real-work situations

►**EXA helps improve your corporate proposal development capability**

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Discussion

►Key Considerations

1. How critical is this opportunity?

2. What skills and resources do we need?

3. How will success be measured?

4. When could EXA begin the engagement process?

5. Have we considered all the known and unknown factors?

►Timing & Next Steps

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