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Proposal outlining & content planning

Best practice

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Outlining (“schetsen”)



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- Outlining supports proposal content planning and provides a hierarchical list of major topics or headings to be covered. The outline is used to develop content, guide writers and to monitor quality and progress.

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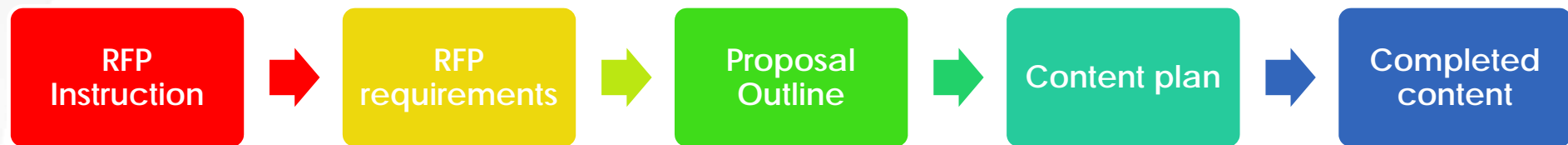


Figure 1. Content Development Process. Content Development should be driven by the requirements of the customer's evaluation process.

Benefits of outlining & content planning



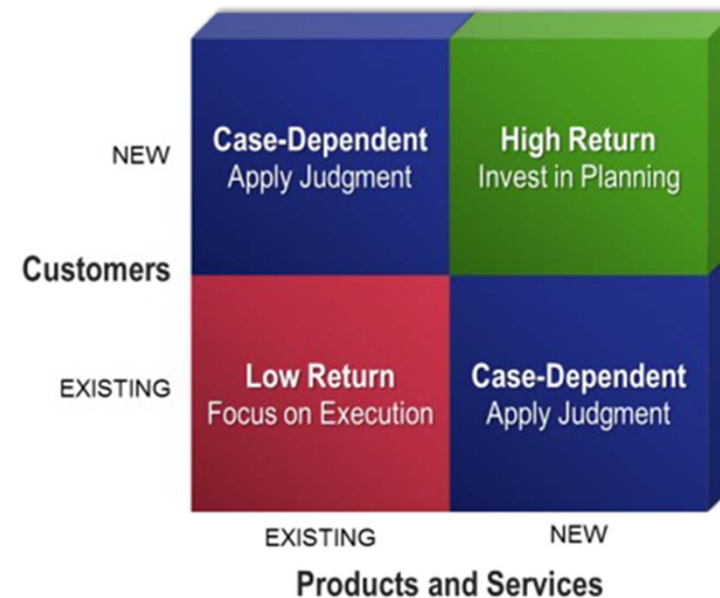
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- Content planning offers the following benefits
 - Contributes to opportunity strategies
 - Communicates win themes
 - Helps ensure compliance
 - Enables review of plans before development
 - Helps writers structure their thinking
 - Improves consistency of messages

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Adapt your approach

- The time invested in content planning should match the likely ROI



Determining Level of Planning Needed Organizations should spend the most time planning responses to bid for new customers in need of new products and services.

Follow instructions / requests from the customer



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■ Informal requests

- Use meeting records, verbal communication, hot buttons, ... to build a requirements list
- Group requirements by category and priority

■ Formal request

- Thoroughly analyze the RFP
- Strip relevant items within the request that state or imply specific requirements (next slide)
- Incorporate strategy plan
- Ask SMEs to analyze technical and solution requirements
- Pay particular attention to proposal requirements

Strip requirements



Stripping Requirements from an RFP. Follow the sequence of the request. Number each item as a separate requirement. Distinguish between solution requirements and response requirements.

3 Project Plan

For the purposes of responding to this RFP the bidder must provide a high level project plan. The plan must be comprehensive enough in scope and detail to convey the bidder's ability to manage this project as specified in this RFP. The plan should also reflect the bidder's mechanism to manage processes interdependencies as well as the sign-off process.

The bidder must indicate in his plan how the status and visibility of project progress will be monitored. Bidders must describe their approach to project management during the implementation and operational phases as well as managing and coordinating different phases and activities of the project.

3.1 Project Change Management Plan

The Bidder shall adhere to the change control procedures of Customer PMT. The bidder must clearly notify Customer officially of any change to the approved project plan in general and its impact with respect to scope, time, cost and resource.

3.2 Project Organization Plan and Stakeholder Analysis

The Bidder shall provide an organization and staffing plan that includes the organization for the management and execution of the project.

Bidders shall develop a stakeholder analysis document that shows all the stakeholders and their requirements, interests and expectations.

3.3 Project Issues & Risk Management Plan

Bidder shall describe their approach to managing risk and issues on the project. The processes and procedures used for managing issues & Risks should align with Customer PMT where appropriate. The logging and tracking of issues and risks will be done using the Electronic Project Management Platform at Customer.

3.4 Project Communications Management Plan

Bidder must describe how project communications will be managed making reference to project status reporting and other communications events.

3.5 Project Quality Management

The Bidder shall provide a quality assurance plan to insure that all deliverables meet the stated requirements of this RFP.

| # | Requirement text | Req. Type | Comply |
|---|---|-----------|--------|
| 3.0 Project Plan | | | |
| 128. | For the purposes of responding to this RFP the bidder must provide a high level project plan. | Response | Y |
| 129. | The plan must be comprehensive enough in scope and detail to convey the bidder's ability to manage this project as specified in this RFP. | Response | Y |
| 130. | The plan should also reflect the bidder's mechanism to manage processes interdependencies as well as the sign-off process. | Response | Y |
| 131. | The bidder must indicate in his plan how the status and visibility of project progress will be monitored. | Response | Y |
| 132. | Bidders must describe their approach to project management during the implementation phases | Response | Y |
| 133. | Bidders must describe their approach to project management during the operational phases. | Response | Y |
| 134. | Bidders must describe their approach to managing and coordinating different phases and activities of the project. | Response | Y |
| 3.1 Project Change Management Plan | | | |
| 135. | The Bidder shall adhere to the change control procedures of Customer PMT. | Solution | |
| 136. | The bidder must clearly notify Customer officially of any change to the approved project plan in general. | Solution | Y |
| 137. | The bidder must clearly notify Customer officially of any change impact with respect to scope, time, cost and resource. | Solution | Y |
| 3.2 Project Organization Plan and Stakeholder Analysis | | | |
| 138. | The Bidder shall provide an organization and staffing plan that includes the organization for the management and execution of the project. | Response | Y |
| 139. | Bidders shall develop a stakeholder analysis document that shows all the stakeholders and their requirements, interests and expectations. | Solution | Y |
| 3.3 Project Issues & Risk Management Plan | | | |
| 140. | Bidder shall describe their approach to managing risk and issues on the project. | Response | Y |
| 141. | The processes and procedures used for managing issues & Risks should align with Customer PMT where appropriate. | Solution | Y |
| 142. | The logging and tracking of issues and risks will be done using the Electronic Project Management Platform at Customer. | Solution | Y |
| 3.4 Project Communications Management Plan | | | |
| 143. | Bidder must describe how project communications will be managed making reference to project status reporting and other communications events. | Response | Y |
| 3.5 Project Quality Management | | | |
| 144. | The Bidder shall provide a quality assurance plan to insure that all deliverables meet the stated requirements of this RFP. | Response | Y |

Compliance matrix and response matrix



| Req | Description | Compliance | Response |
|-----|--|----------------|---------------------------------|
| 1 | Lorem ipsum dolor sit amet, consectetur adipiscing elit. | Full | Volume 2, Section 1, Para. 2.1 |
| 2 | Maecenas porttitor congue massa. | Full | Volume 2, Section 2, Para. 2.2 |
| 3 | Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. | Full | Volume 2, Section 2, Para. 2.3 |
| 4 | Nunc viverra imperdiet enim. | Full | Volume 2, Section 3, Para. 2.4 |
| 5 | Fusce est. Vivamus a tellus. | Full | Volume 2, Section 3, Para. 2.5 |
| 6 | Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. | Partly | Volume 2, Section 4, Para. 2.6 |
| 7 | Proin pharetra nonummy pede. | Full | Volume 2, Section 4, Para. 2.7 |
| 8 | Mauris et orci. | Full | Volume 2, Section 4, Para. 2.8 |
| 9 | Aenean nec lorem. | Full | Volume 2, Section 5, Para. 2.9 |
| 10 | In porttitor. Donec laoreet nonummy augue. | Not applicable | Volume 2, Section 5, Para. 2.10 |

Compliance and response matrix. After stripping the requirements you can use compliance and response matrices to provide requirements traceability between the customer request and your written offer for both formal and informal responses. Your customer may require to submit a statement of compliance in this form

Types of outline

EXECUTIVE SUMMARY

- Problem
- Recommendation
- Proof
- Action

TECHNICAL SOLUTION

- Performance
 - Throughput
 - Response
- Availability
 - Redundancy
 - MTBF / MTTR
- Environment
 - Footprint
 - Power Consumption

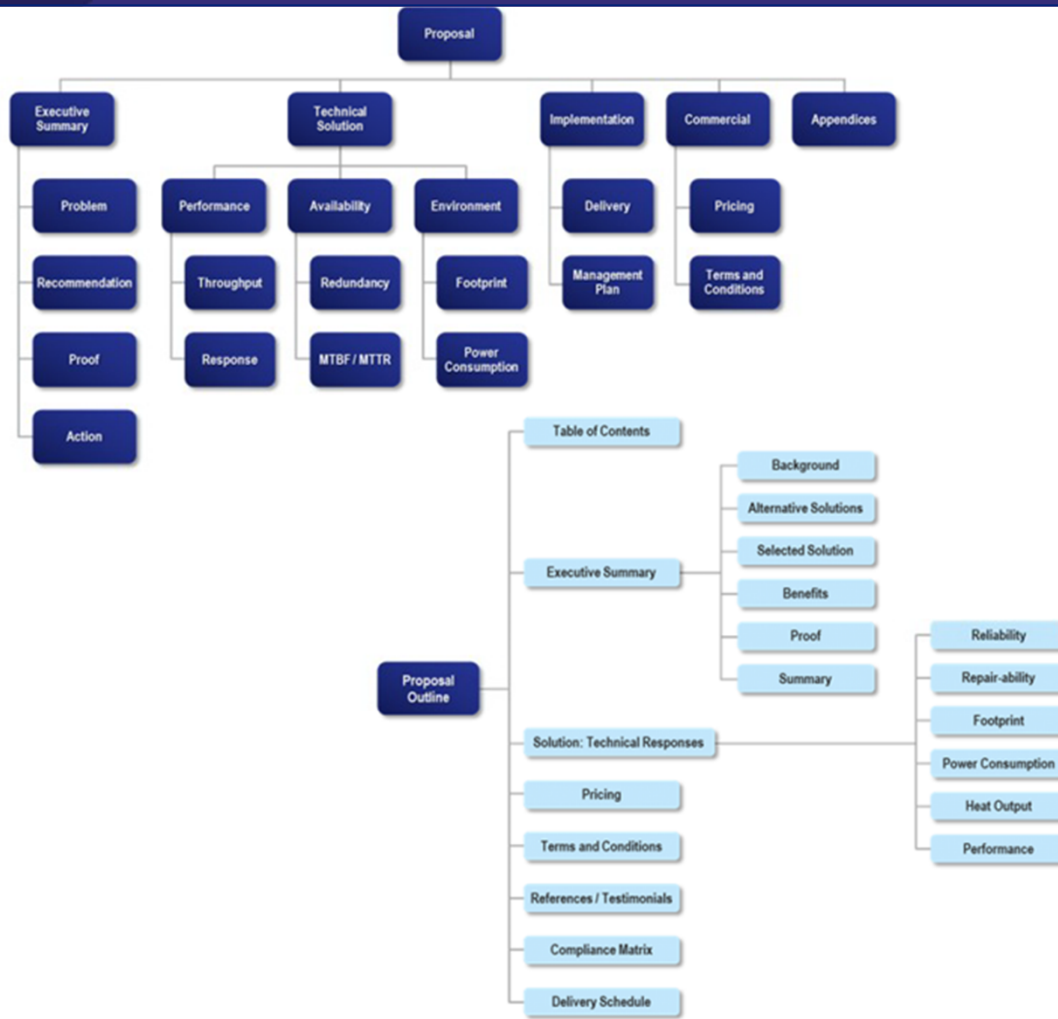
IMPLEMENTATION

- Delivery
- Management Plan

COMMERCIAL

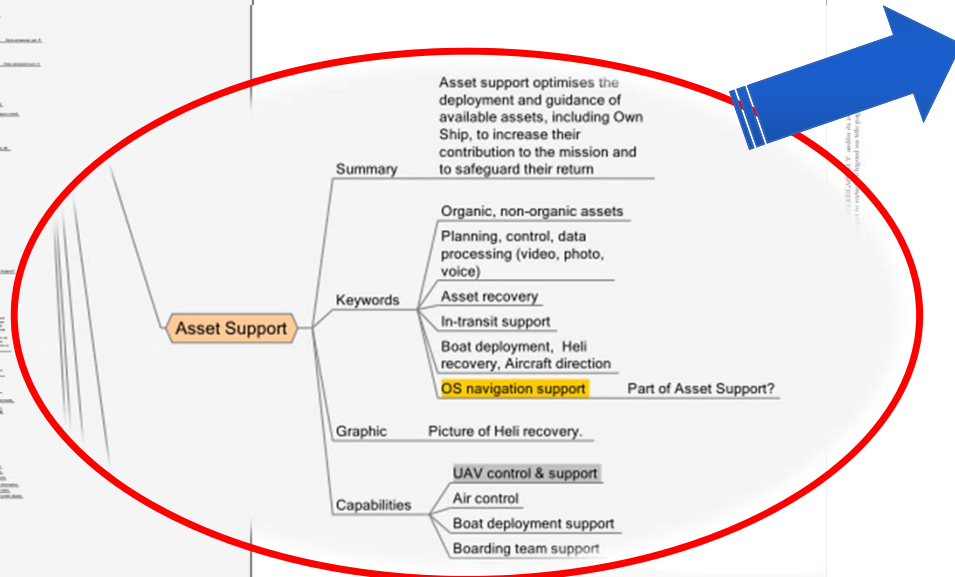
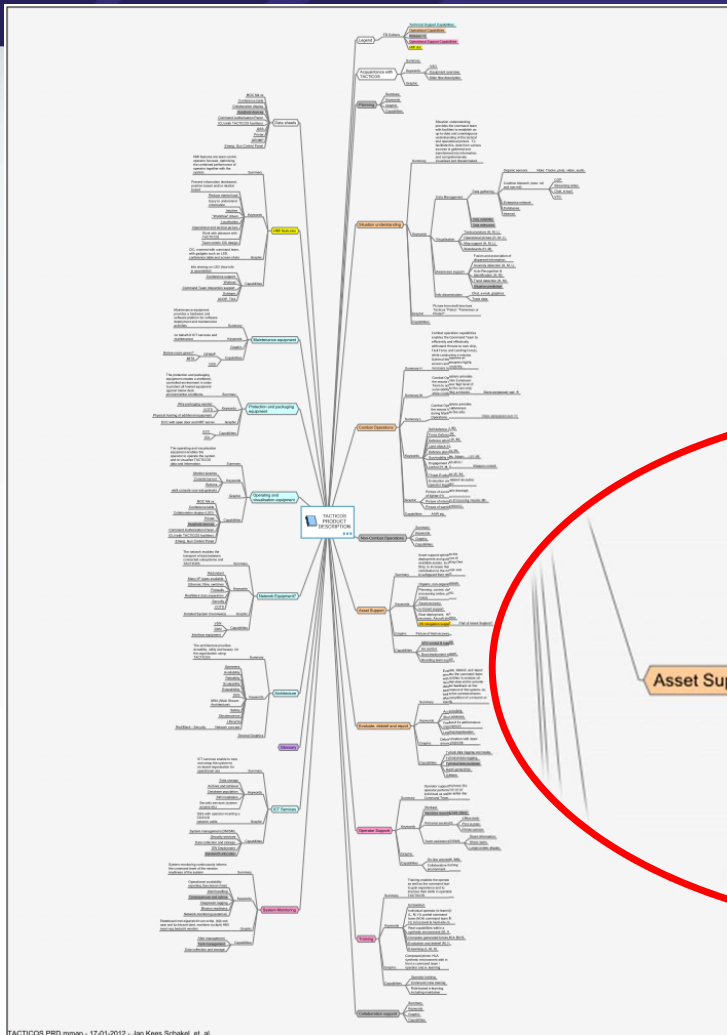
- Pricing
- Terms and Conditions

APPENDICES



Types of Outlines. An indented list, hierarchy, or mind map are all valid ways to represent an outline.

Example: Mindmap as Outline / Content Planning tool



2.3. Asset Support

Asset support optimises the deployment and guidance of all available assets that are under (temporary) direction of the command team, including the own ship, to extend their contribution to the mission and to safeguard their return.

Deployment, guidance, and recovery of assets

Conducting a successful mission often requires the deployment and guidance of additional assets. This may vary from the deployment and recovery of an onboard helicopter for Over The Horizon Targeting (OHT), the direction of a Maritime Patrol Aircraft (MPA) for surveillance, or the deployment and recovery of Rigid Hulled Inflatable Boats (RHIB) for boarding operations.

TACTICOS supports the preparation and coordination of the deployment and guidance of the available assets. These assets (either organic or non-organic) remain under direction of the command team for a certain period of time, as required.

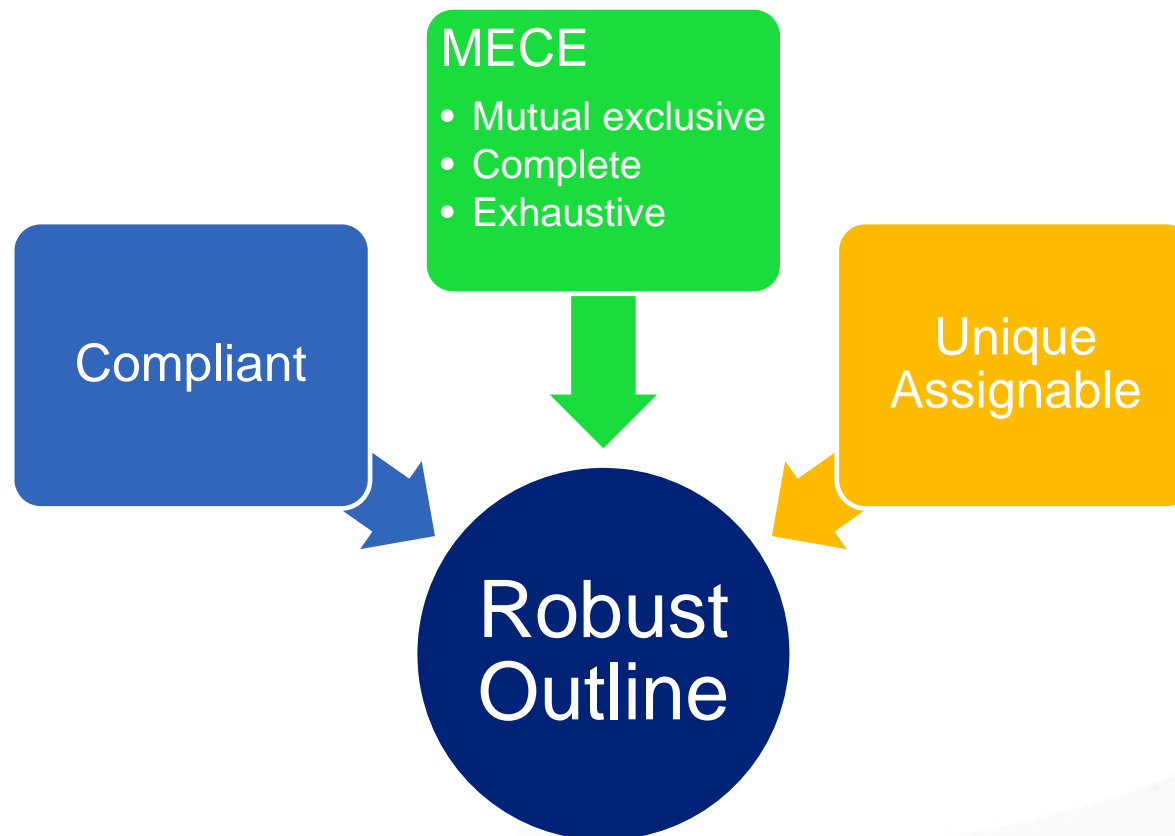
Asset Support is based on a comprehensive data exchange between the assets involved, for example by voice, data link, photo, or streaming audio and or video. On board the own ship all gathered data can be combined and processed. Next the derived information can be disseminated to all assets involved. This guarantees for all assets an up-to-date and unambiguous perception of the tactical and operational situation.

The own ship is also regarded as an asset. Asset Support provides a set of capabilities for manoeuvring the own ship. It enables execution of force formations, as well as own ship navigation.



Figure 2-1. Asset Support – A helicopter controller on board the ship can direct a non-organic helicopter to a position near the flight deck. This enables the helicopter pilot to drop off people without landing the helicopter.

A Robust Outline



Annotate the outline

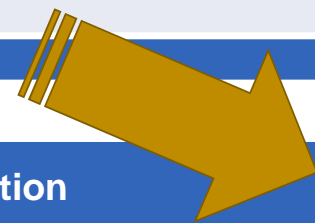


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- The outline annotations describe what to expect from each section
- They are the quality criteria. Use these quality criteria to check delivered content when it is returned by authors
- Annotation should include:
 - RFP requirements to be addressed
 - Themes and strategies for the section
 - Customer terminology/style to be used
 - Graphics to be used
 - Boilerplate to be used
 - Proof points to support claims
 - Page and word count limits

Page allocation

| Criterion | Category | Weight | Proposal Section | Draft page allocation |
|-----------|------------|--------|--------------------------------|-----------------------|
| 1 | Technical | 50 | | 50 |
| | | | 1. System Hardware | 14 |
| | | | 2. System and Network Software | 28 |
| | | | 3. Training | 8 |
| 2 | Management | 30 | Project management | 30 |
| 3 | Cost | 20 | Cost | 20 |
| | | | | Total: 100 |



Establishing Page Count Guidelines

Allocate pages according to their relative importance to the evaluator. After your initial page allocation, adjust it based on the number required and your strategy. Allocate 5 to 10 percent for the executive summary and 5 to 10 percent for the contingency that someone might exceed the limit.

| | Section | Final Page # | Comments |
|------------------------|-----------------------------|--------------|--|
| | Executive Summary | 6 | Approximately 5 to 10 percent of total |
| 1 | System Hardware | 12 | Reduced, not a discriminator |
| 2 | System and network software | 27 | Equal to weight less executive summary |
| 3 | Project Management | 32 | Increased: discriminator for us |
| 4 | Training | 10 | Increased: hot button of key evaluator |
| 5 | Cost | 8 | Decreased: use tables extensively |
| Total: | | 95 | |
| Contingency: | | 5 | |
| Page limit RFP: | | 100 | |

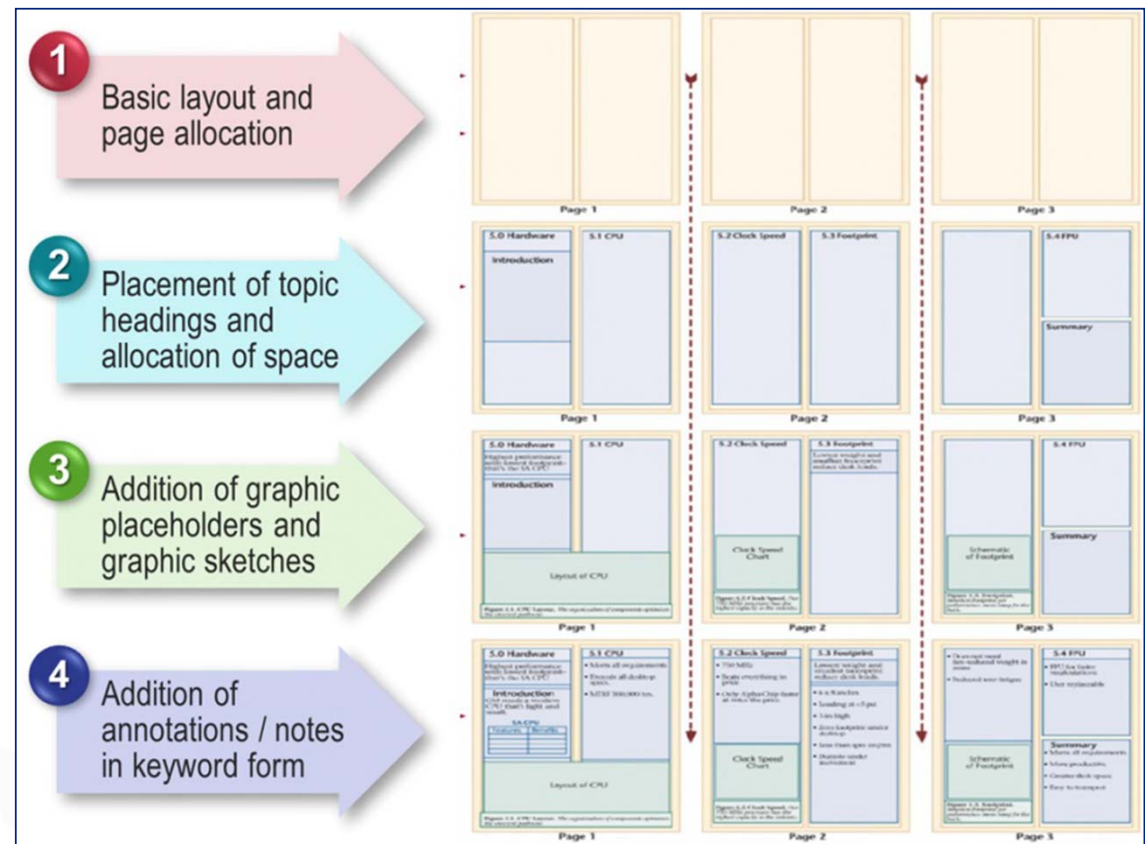
Develop detailed plans for important sections



Section Content Plan / Storyboard

| | | | |
|--|----------------------------------|--------|-------------------|
| Proposal | Gulf Area Process Transformation | Volume | Management Volume |
| Section | 3.0 Project Management | Author | A Murray |
| <p>BRIEF SUMMARY of the Section – What's the purpose of this chapter/section To demonstrate our ability to manage the project and specifically:</p> <ul style="list-style-type: none"> • Address the whole scope of the project • Track and manage interdependencies in the process mapping • Manage progress and provide visibility <p>Requirements/ RFP Sections covered. Section 3 Project Management. (paras 3.0) Requirements Checklist: Requirements 128 to 134</p> | | | |
| <p>CUSTOMER ISSUES AND CONCERNS SPECIFIC TO THIS SECTION Managing process interdependencies between departments Securing sign-off by multiple stakeholders</p> | | | |
| <p>WIN THEMES APPLICABLE TO THIS SECTION Change in safe hands Keeping progress visible</p> | | | |
| <p>PROOFS, EVIDENCE, CASE STUDIES Metropolis Change Programme Capital Ambition project Engage methodology endorsement (Aaron C Reskew)</p> | | | |
| <p>MAIN BODY OUTLINE (Main headings, content notes) 3.0 Project Management</p> <ul style="list-style-type: none"> 3.0.1 Comprehensive scope <ul style="list-style-type: none"> • Use PBS to show that we have covered everything 3.0.2 Managing Interdependencies <ul style="list-style-type: none"> - Process Mapping - Securing Signoff 3.0.3 Monitoring status <ul style="list-style-type: none"> - Controlling progress - Providing visibility | | | |
| <p>GRAPHICS / BOILERPLATE TO RE-USE Benefits Map (Re-use and adapt the UAE project map) Project top-level PBS (New) shows complete coverage of scope Product Flow Diagram (New) tracks interdependencies Capital Ambition Case Study</p> <p>NB: Sketch any new graphics to be created on the reverse of this form</p> | | | |

Mock-up



Involve the authors



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When using section content plans

- Distribute initial section content plans at the kickoff for further development by authors
- The Proposal Manager should agree to the content plans before writing starts
- The content plans provide quality criteria for acceptance of all finished content

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Review annotated outline/plans before writing



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- The review should include all internal stakeholders in the proposal, including:
 - Proposal contributors and authors
 - Appropriate senior managers who have an interest in the proposal
 - Members of the final document review team, if planned
 - Members of the core team
- Team review of content plans helps communicate strategy, align thinking, and enhance compliance.

Proposal Responsibility Matrix



| # | Section | Pages | Author | Mock-up due | Pink review | Red review | Print |
|---|-----------------------------|-------|--------|-------------|-------------|------------|-------|
| | Executive Summary | 6 | David | 26/3 | 28/3 | 15/4 | 18/4 |
| 1 | System Hardware | 12 | John | 26/3 | 28/3 | 15/4 | 18/4 |
| 2 | System and network software | 27 | Felix | 26/3 | 28/3 | 15/4 | 18/4 |
| 3 | Project Management | 32 | Sandra | 26/3 | 28/3 | 15/4 | 18/4 |
| 4 | Training | 10 | Ellen | 26/3 | 28/3 | 15/4 | 18/4 |
| 5 | Cost | 8 | Sara | 26/3 | 28/3 | 15/4 | 18/4 |

Proposal Responsibility Matrix. Sometimes called a Program Control Matrix, proposal managers use it to manage and monitor the status of each section assigned to each writer. Using spreadsheet software, add a row for each task and a column for each milestone. Keep a version prominently displayed in the proposal room and review progress in the daily stand-up meeting.

Key principles







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- Adapt your approach
- Develop the outline according to the instructions and requests from the customer
- Make the outline robust
- Annotate the outline
- Allocate pages according to relative importance of the topic
- Develop detailed content plans for important sections
- Involve the writers in content planning
- Review content plans before starting to write
- Extend the outline into a Proposal Responsibility Matrix

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Key principles: where to add strategy

- Adapt your approach
-  ▪ Develop the outline according to the instructions and requests from the customer
- Make the outline robust
-  ▪ Annotate the outline
-  ▪ Allocate pages according to relative importance of the topic
-  ▪ Develop detailed content plans for important sections
- Involve the writers in content planning
- Review content plans before starting to write
- Extend the outline into a Proposal Responsibility Matrix

References



- APMP Body Of Knowledge
 - <http://bok.apmp.org>
 - Section on Outlining & Content Planning
<http://bok.apmp.org/bok/content-plans>

