

# *Critical Strategic Initiatives (CSI)*

**Proposal Centers of Excellence**

**APMP-NCR Round Table**

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# Overview

- ▶ What is a Proposal Center of Excellence (PCOE)?
- ▶ How do you structure the PCOE Organization?
- ▶ What are the benefits of a PCOE? What are the challenges?
- ▶ Conclusion

# **CSI is a Center of Excellence that was established to develop, document and execute capture and proposal best practices**

- ▶ **CSI's mission is to improve the firm's ability to win procurements of strategic importance through:**
  - Collaborating with client teams to develop capture strategies and deliver expertly crafted proposals,
  - Remediating recurring competitive challenges through the formation of service offerings that include shoulder-to-shoulder consulting, tools, and training,
  - Developing, documenting, and sharing lessons learned that strengthen the Firm's approach to winning competitive procurements, and,
  - Reducing proposal costs through the use of best practices.
- ▶ **CSI is comprised of experienced business development subject matter experts, including Partners and “black belts”, with demonstrated proposal development success.**
  - Provides consulting and hands-on support to teams delivering on a variety of competitive procurements, touching all major markets and geographies across the firm.
- ▶ **CSI engages with client teams to meet the challenges of their procurement opportunities—large and small.**
  - CSI's commitment can be for the full life cycle of a procurement effort or to achieve goals within a discrete phase of the life cycle.

# CSI provides the following range of services designed to augment client team expertise

- ▶ **Capture Consulting**
  - Assists with developing the capture plan
- ▶ **Proposal Management Consulting**
  - Helps prepare teams for Request for Information (RFI) and Request for Proposal (RFP) release
  - Facilitates transition from capture to proposal development
  - Coordinates the color team review process
- ▶ **Past Performance Consulting**
  - Assists with developing compelling, high-impact qualifications
  - Manages CPARS
- ▶ **Management Solutions Services**
  - Develops tools, templates, and training on management plans
- ▶ **Sample Task Order Consulting**
  - Provides training and support in developing Sample Task Order responses
- ▶ **Strategic Engagements**
  - Offers hands-on support to assist client teams in winning their most critical procurements (full life cycle)

# Senior leadership support is critical to establishing and maintaining a Proposal Center of Excellence

- ▶ **CSI Partners provide financial support and guidance on critical aspects of the program to include:**
  - Structure and organization
  - Resources
  - IC Development
- ▶ **The primary role of CSI is consulting and training, the secondary role is filling a gap on client team for strategic procurements (i.e. proposal manager, past performance volume, etc.)**
- ▶ **CSI is constructed to provide tiered levels of support –**
  - Strategic Engagements (due diligence of the opportunity – full life cycle support)
  - Service Offering Support (specific, targeted support i.e. past performance quals)
  - Self Help (Portal)
    - ▶ Templates
    - ▶ Proposal Artifacts

## What CSI is?

Provides experienced blackbelts to work side by side with capture and proposals teams, following an operating “Framework” that is being institutionalized across the firm through best practices.

## What CSI is not?

CSI does not take over strategic pursuits, but rather it supports them. CSI is not the final decision maker, the client team is the responsible owner of the procurement effort.

# There are benefits and challenges in establishing a PCOE

- ▶ **Applying proven, repeatable processes that can be tailored to meet individual procurement requirements saves time and money through:**
  - Improving the efficiency of business development efforts.
  - Facilitating access to developed and proven intellectual capital.
  - Increasing the effectiveness of reviews throughout the stages of proposal development.
  - Bringing best practices, talented resources, and experience to bear on key strategic pursuits.
  - Documenting best practices and institutionalizing them throughout the firm.
- ▶ **Developing an organized approach will help facilitate some of the inherent challenges in building and maintaining a PCOE such as:**
  - Obtaining critical leadership buy-in at the onset and involving them in the entire project by assigning responsibilities and ownership.
  - Designing an integrated organization to support corporate strategy.
  - Agreeing on the process to be executed and supported by the organization.
  - Concurring on the tools to be used in support of the executed process.
  - Providing training to help institutionalize the approach and facilitate agreement across the firm.

# Conclusion

## ▶ Questions

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