




2019

Mid-Atlantic Conference and Expo

Aspire, Inspire, Rejuvenate, & Learn.

10/16/19 – 10/17/19



When Word Can't Cut It, Try Excel

From proposal planning through lessons learned - take advantage of Excel's capabilities to organize and structure your data



When Word Can't Cut It, Try Excel

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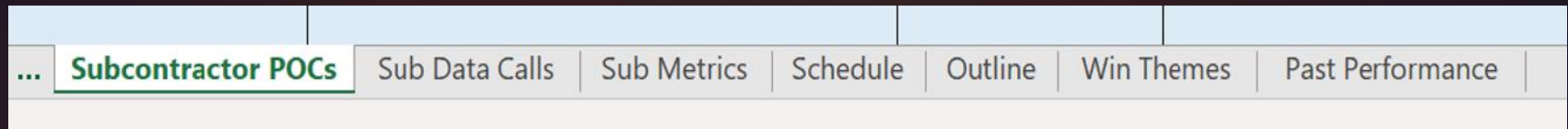
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Today's Agenda

- Organize elements of proposal management
- Track and coordinate proposal participation
- Track and analyze proposal factors
- Capture and apply lessons learned

Proposal Management Plan

Organize your elements of proposal management in a central location



Excel offers easy to navigate tabs for each proposal management plan element

Proposal Management Plan

Elements to Build in Excel

- Store teammate POC information and roles
- Build schedule with key milestones
- Create outline and compliance matrices
- Capture win themes
- Compare past performance references



Proposal Management Plan

Useful Functions

Simple ways to insert new information and to keep the most critical in view when navigating large amounts of information

- Freeze panes: Lock columns or rows in place (keep on screen) as you scroll down or across large sheets of information
- Add/delete column and rows: Easily insert, remove, and move columns and rows across sheets (helpful when adding milestones or new participants)
- Hide/unhide (group/ungroup): Hide elements of your management plan as you complete them, without losing the information

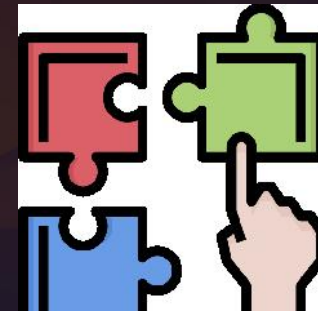
Proposal Management Plan

- Start each proposal management plan from a basic excel template
- Store your planning information

	A	B	C	D	E
1	Name	Company	Function/Role	Phone #	E-mail
2	Jim Cook	A Inc. Associates	Technical	(800) 555-9000	joe@example.com
3	Scott Wolfe	A Inc. Associates	Technical	(800) 555-9001	sue@example.com
4	Joe Guy	A Inc. Associates	Staffing	(800) 555-9002	joe@example.com
5	Sue Gal	A Inc. Associates	Staffing	(800) 555-9003	sue@example.com
6	Joe Guy	A Inc. Associates	Past Performance	(800) 555-9004	joe@example.com
7	Sue Gal	A Inc. Associates	Cost	(800) 555-9005	sue@example.com
8	Joe Guy	B Co. LLC	Technical	(800) 555-9006	joe@example.com
9	Sue Gal	B Co. LLC	Staffing	(800) 555-9007	sue@example.com
10	Joe Guy	B Co. LLC	Past Performance	(800) 555-9008	joe@example.com
11	Sue Gal	B Co. LLC	Cost	(800) 555-9009	sue@example.com
12	Joe Guy	B Co. LLC	Technical	(800) 555-9010	joe@example.com
13	Sue Gal	B Co. LLC	Staffing	(800) 555-9011	sue@example.com
14	Joe Guy	B Co. LLC	Past Performance	(800) 555-9012	joe@example.com
15	Sue Gal	B Co. LLC	Cost	(800) 555-9013	sue@example.com
16	Joe Guy	C Partners	Technical	(800) 555-9014	joe@example.com
17	Sue Gal	C Partners	Staffing	(800) 555-9015	sue@example.com
18	Joe Guy	C Partners	Past Performance	(800) 555-9016	joe@example.com
19	Sue Gal	C Partners	Cost	(800) 555-9017	sue@example.com
20	Joe Guy	C Partners	Technical	(800) 555-9018	joe@example.com
21	Sue Gal	C Partners	Staffing	(800) 555-9019	sue@example.com
22	Joe Guy	C Partners	Past Performance	(800) 555-9020	joe@example.com
23	Sue Gal	C Partners	Cost	(800) 555-9021	sue@example.com
24	Joe Guy	D Team Exec	Proposal Coordinator	(800) 555-9022	joe@example.com
25	Sue Gal	D Team Exec	Technical	(800) 555-9023	sue@example.com
26	Joe Guy	D Team Exec	Staffing	(800) 555-9024	joe@example.com
27	Sue Gal	D Team Exec	Past Performance	(800) 555-9025	sue@example.com
28	Joe Guy	D Team Exec	Cost	(800) 555-9026	joe@example.com
29	Sue Gal	D Team Exec	Additional Proposal Staff	(800) 555-9027	sue@example.com
30					
31					
32					

Proposal Participation

Track and coordinate your proposal participation activities, status, and resources



Proposal Participation

Elements to Modify in Excel

Minimal effort to update and compare proposal activity using built-in tools

- Track multiple data calls from multiple partners
- Calculate page counts; view totals by author or section
- Use color coding to communicate compliance status
- Capture and compare color team action items



Proposal Participation

Useful Functions

Quickly view the most critical elements, sections, or actions that require attention

- Drop down lists: Quickly fill-in cells with pre-selected information
- Filter Ascending-Descending: Find sets of information fast (e.g. group and sort outline sections that each author is assigned)
- Sum function: Tally information (page count totals and metrics)
- Conditional formatting: Built-in tool for marking elements as red/yellow/green

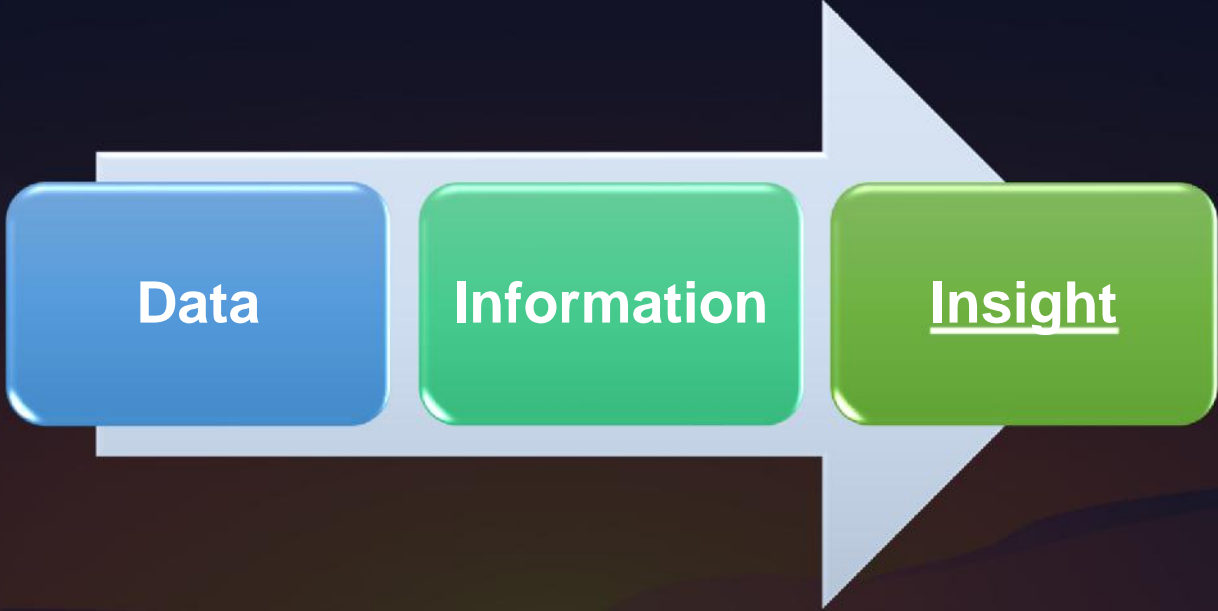


Proposal Participation

Easily update your management plan; view and communicate status quickly

	A	D	G	H	I	J	K
1	Company	Data Call #1 Update	Staff Data Call #1	PP Data Call 1	Tech Data Call 1	Pricing Data Call 1	Column5
2	A Inc. Associates	Received	Please Select	Please Select	Received		
3	B. Co, LLC	Received	Received	Received	Received		
4	C Partners		Outstanding				
5	D Team Exec	Received	Received	Please Select			
6	E Consulting	Received	Received	Please Select			
7	F Group	Received			Received		
8	H Management	Received	Received	Received	Received		
9							
10							
11							
12							
13							
14							

Track & Analyze Proposal Factors



Track & Analyze Proposal Factors

- Create a central repository to track submitted proposal data
 - Agency
 - Evaluation Method
 - Contract Type
 - Company Role (Prime, Sub, JV)
 - Internal Contributors (Capture Manager, Proposal Manager, Technical Lead, etc)
 - Evaluation Notices
- Quick and easy reference tool
- Provides insight into trends – leads to better decision making

Track & Analyze Proposal Factors

Identifying Trends to Make Informed Decisions

Opportunity Name	Solicitation Number	Stage	Outcome	RFP Release Date	Prop Due Date	Turn Around Time (Days)	Tier 1 Customer Agency	Tier 2 Customer Agency	Tier 3 Customer Agency	Competition Type	Evaluation Method	Primary Contract Type
Proposal 1	RFP-0001	Awarded	Win	1/25/2019	2/25/2019	31	Civilian	DHS	CBP	Full and Open / Unrestricted	Full Trade-off	FFP
Proposal 2	RFP-0002	Awarded	Win	2/1/2019	2/16/2019	15	DoD	Army	AMC	Full and Open / Unrestricted	LPTA	FFP
Proposal 3	RFP-0003	Awarded	Loss	3/15/2019	3/29/2019	14	Civilian	DOL	BLS	Full and Open / Unrestricted	Full Trade-off	T&M
Proposal 4	RFP-0004	Awarded	Loss	4/20/2019	5/1/2019	11	DoD	Navy	NAVAIR	Full and Open / Unrestricted	Full Trade-off	CPFF
Proposal 5	RFP-0005	Awarded	Win	5/15/2019	7/1/2019	47	DoD	Air Force	Air Combat Command	Set aside	Full Trade-off	FFP
Proposal 6	RFP-0006	Awarded	Loss	6/1/2019	6/15/2019	14	Civilian	DOL	BLS	Full and Open / Unrestricted	Full Trade-off	T&M
Proposal 7	RFP-0007	Source Selection		6/15/2019	7/1/2019	16	DoD	Army	AMC	Full and Open / Unrestricted	Full Trade-off	T&M

Opportunity Name	Role	Prime Contractor	Workshare	Capture Manager	Proposal Manager	Tech Lead	PP Lead	Cost Lead	Total Evaluated Price
Proposal 1	Prime	Company A	100%	Alice	Joe	Sam	Ed	Lauren	\$80,000,000
Proposal 2	Prime	Company A	100%	John	Kim	Bill	None	Jack	\$50,000,000
Proposal 3	Prime	Company A	100%	Alice	Kim	Bob	Sue	Jack	\$150,000,000
Proposal 4	Prime	Company A	100%	John	Joe	Bill	Ed	Nancy	\$55,000,000
Proposal 5	Sub	Company B	30%	Christopher	Kim	Sam	Sue	Lauren	\$75,000,000
Proposal 6	Prime	Company A	100%	Alice	Kim	Bob	Sue	Lauren	\$55,000,000
Proposal 7	Prime	Company A	100%	Alice	Joe	Sam	Sue	Lauren	\$25,000,000

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Capture and Apply Lessons Learned

“Those that fail to learn from history, are doomed to repeat it.” – *Winston Churchill*



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Capture and Apply Lessons Learned

- Document all Evaluation Notices
- Always ask for a debrief, win or lose, and document feedback
- Review results on a regular basis to adjust strategy → leading to improved pWin



Capture and Apply Lessons Learned

Opportunity Name	Receive ENs?	EN Topics	Award Date	Awardee	Award Value	Receive Debrief?	# Bids Received	Overall Proposal Rating	Technical	Management	Staffing	Past Performance	Price
Proposal 1	Yes	Past Performance	4/1/2019	Company A	\$80,000,000	Yes	3	Excellent	Excellent	Acceptable	Very Good	Very Good	Fair and Reasonable
Proposal 2	No		5/1/2019	Company A	\$40,000,000	Yes	5	Not Rated	Not Rated	Not Rated	Not Rated	Not Rated	Not Lowest
Proposal 3	No		6/1/2019	Company X	\$150,000,000	Yes	4	Acceptable	Acceptable	Marginal	Acceptable	Acceptable	Not Fair and Reasonable
Proposal 4	Yes	Technical, Staffing	7/1/2019	Company Y	\$60,000,000	Yes	3	Marginal	Very Good	Marginal	Acceptable	Acceptable	Fair and Reasonable
Proposal 5	No		8/1/2019	Company A	\$75,000,000	Yes	4	Very Good	Very Good	Very Good	Very Good	Very Good	Fair and Reasonable
Proposal 6	No		8/5/2019	Company Z	\$58,000,000	Yes	3	Acceptable	Very Good	Marginal	Acceptable	Acceptable	Fair and Reasonable

Aspire, Inspi



Capture and Apply Lessons Learned

- Utilize Pivot tables to summarize data in a meaningful way

DEBRIEF SUMMARY - TECHNICAL	
Technical	Count of Technical
Acceptable	1
Excellent	1
Not Rated	1
Very Good	3

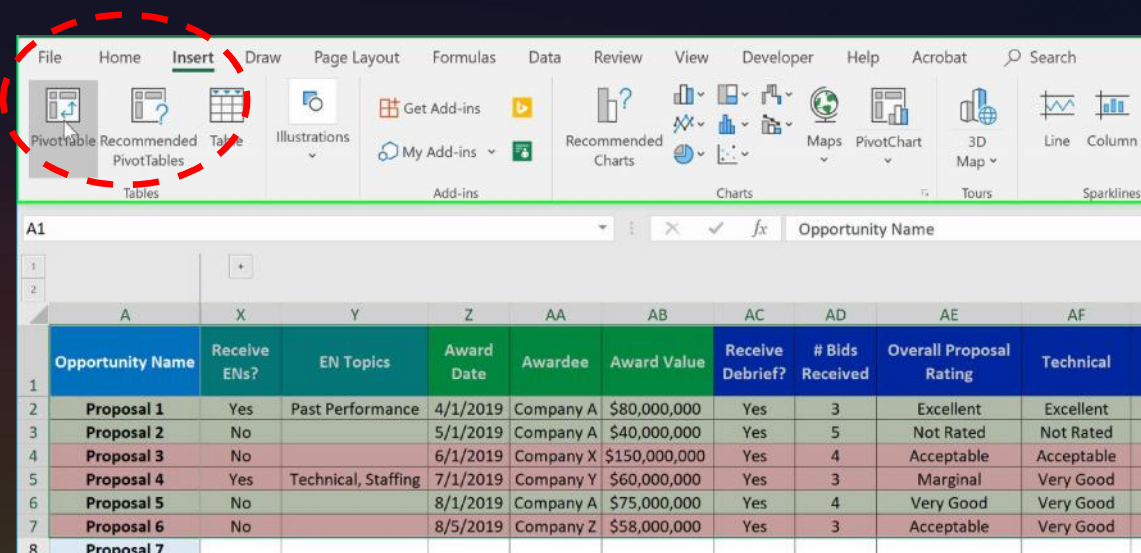
DEBRIEF SUMMARY - MANAGEMENT	
Management	Count of Management
Acceptable	1
Not Rated	1
Marginal	3
Very Good	1



Capture and Apply Lessons Learned

Creating a PivotTable

- Select source data (proposal tracker worksheet)
 - Highlight entire table
- Insert Ribbon
 - Select Pivot Table



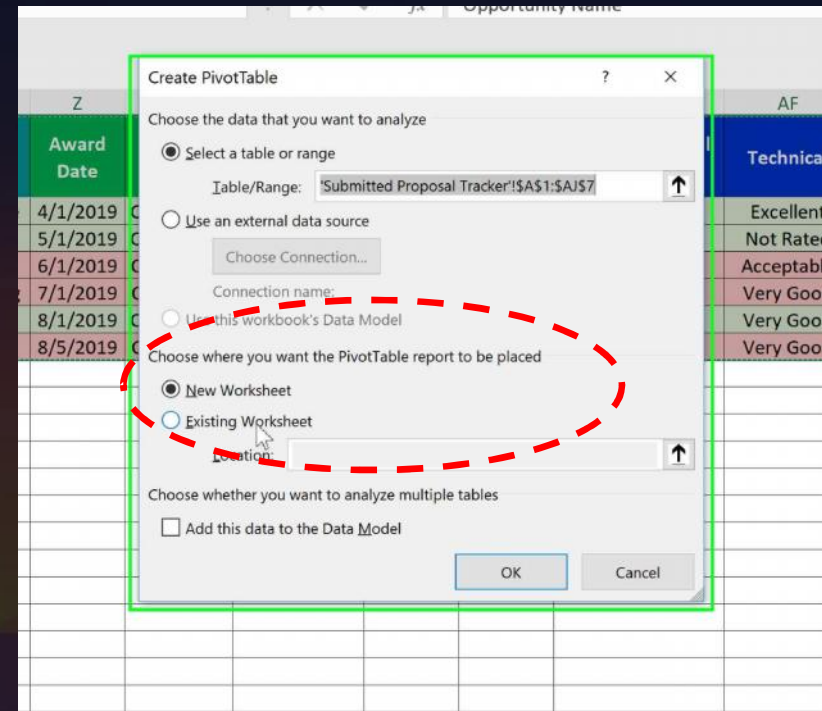
The screenshot shows the Microsoft Excel interface. The 'Insert' ribbon is active, and the 'PivotTable' icon is highlighted with a red dashed circle. Below the ribbon, a table is displayed with the following data:

	A	X	Y	Z	AA	AB	AC	AD	AE	AF
	Opportunity Name	Receive ENs?	EN Topics	Award Date	Awardee	Award Value	Receive Debrief?	# Bids Received	Overall Proposal Rating	Technical
1										
2	Proposal 1	Yes	Past Performance	4/1/2019	Company A	\$80,000,000	Yes	3	Excellent	Excellent
3	Proposal 2	No		5/1/2019	Company A	\$40,000,000	Yes	5	Not Rated	Not Rated
4	Proposal 3	No		6/1/2019	Company X	\$150,000,000	Yes	4	Acceptable	Acceptable
5	Proposal 4	Yes	Technical, Staffing	7/1/2019	Company Y	\$60,000,000	Yes	3	Marginal	Very Good
6	Proposal 5	No		8/1/2019	Company A	\$75,000,000	Yes	4	Very Good	Very Good
7	Proposal 6	No		8/5/2019	Company Z	\$58,000,000	Yes	3	Acceptable	Very Good
8	Proposal 7									

Capture and Apply Lessons Learned

Creating a PivotTable

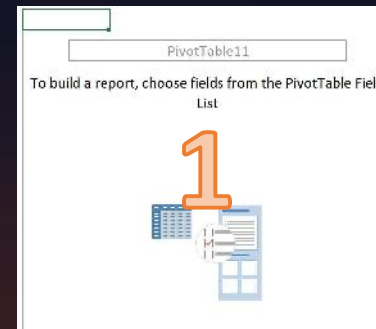
- Choose new or existing worksheet to place PivotTable



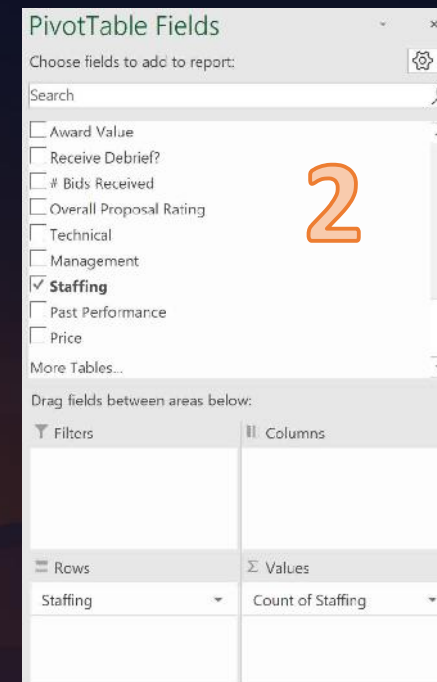
Capture and Apply Lessons Learned

Creating a PivotTable

- Left-click blank PivotTable (1)
- PivotTable Fields appear on right side of worksheet (2)
 - These are column headings from proposal tracker worksheet
- Select which fields from your table to add to your PivotTable report (3)



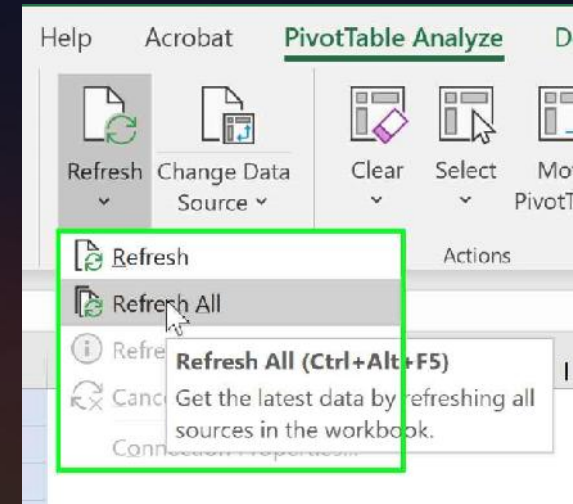
Row Labels	Count of Staffing
Acceptable	3
Not Rated	1
Very Good	2
Grand Total	6



Capture and Apply Lessons Learned

Creating a PivotTable

- PivotTables by default require a manual refresh after any updates to source data



When Word Can't Cut It, Try Excel

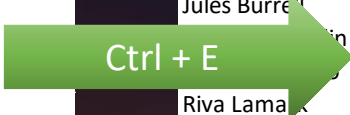
Questions?

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Excel Tips & Shortcuts

- Insert current date: Ctrl and ;
- Insert/edit comment: Shift and F2
- Apply/remove bold formatting: Ctrl and B
- Apply/remove italics formatting: Ctrl and I
- Apply/remove underline formatting: Ctrl and U
- Open spellcheck: F7
- Sum Selected Cells: Alt and =
- Start new line in same cell: Alt and Enter
- Select entire row: Shift and Spacebar
- Select entire column: Ctrl and Spacebar
- Select all: Ctrl and A

- Flash fill: Ctrl and E
 - Fill in first cell of list how you want data formatted
 - Ctrl and E to automatically fill out the rest



Names	Last, First Initial
Kathlene Schiro	Schiro, K.
Jules Burrell	Burrell, J.
Hien McLaughlin	McLaughlin, H.
Cedric Gaetano	Gaetano, C.
Riva Lamark	Lamark, R.
Nerissa Mangual	Mangual, N.
Jannie Daffron	Daffron, J.
Lupe Teague	Teague, L.

Names	Last, First Initial
Kathlene Schiro	Schiro, K.
Jules Burrell	Burrell, J.
Hien McLaughlin	McLaughlin, H.
Cedric Gaetano	Gaetano, C.
Riva Lamark	Lamark, R.
Nerissa Mangual	Mangual, N.
Jannie Daffron	Daffron, J.
Lupe Teague	Teague, L.

- Toggle between tabs: Ctrl and PgUp or PgDn
- Copy a tab: Ctrl and drag tab right



10/16/19 – 10/1/19

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