

THE PROPOSAL PROCESS  
THROUGH  
FACT FINDING  
AND  
NEGOTIATIONS

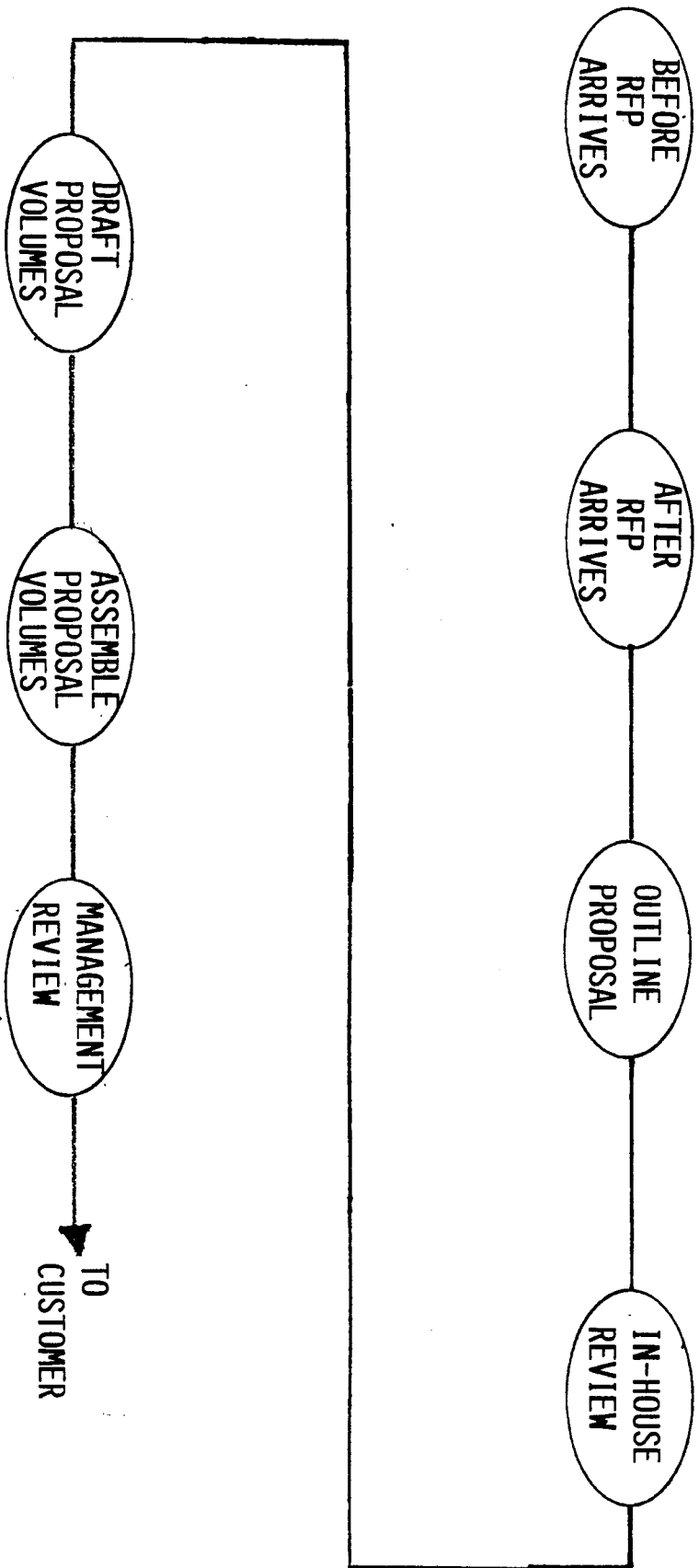
JOHN HOWELL

651-1907

P R O P O S A L S   T Y P E S

- COMPETITIVE
  - UNSOLICITED
  - SOLE SOURCE PROPOSAL
- UNIQUE CAPABILITY/SITUATION
  - INTEGRATOR ROLE

PROPOSAL SEQUENCE



**B E F O R E R F P A R R I V E S**

- **IDENTIFY MARKET**
- **ESTABLISH CUSTOMER CONTACTS**
- **BUILD DATA BASE**

AFTER RFP ARRIVES

- ANALYZE THE RFP
- ATTEND BIDDERS BRIEFING
- TASK TEAM
- HOLD KICK OFF MEETING
- STRATEGY
- SCHEDULE

**O U T L I N E   P R O P O S A L**

- **REQUIREMENTS**
- **CONTRACT DATA REQUIREMENTS LIST**
- **TASK SHEETS**

## I N - H O U S E R E V I E W

- ELIMINATE DUPLICATES
- SCRUB
- REVISE
- FREEZE DESIGN
- STORY BOARD
- PINK TEAM

DRAFT PROPOSAL VOLUMES

● TEXT

● ART



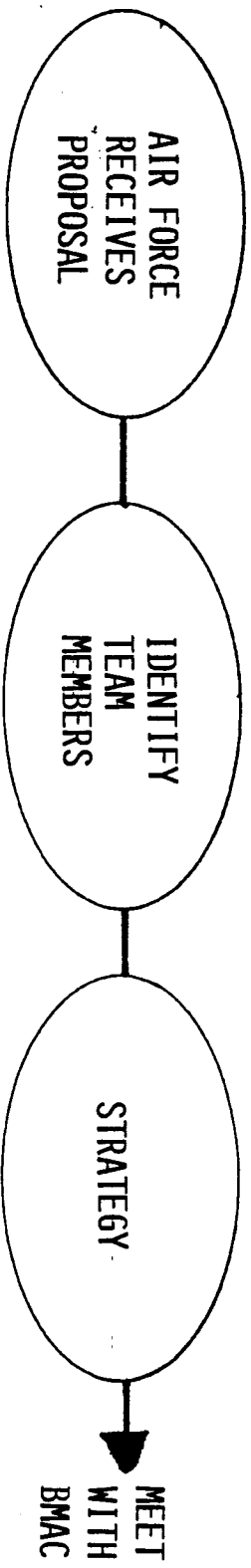
ASSEMBLE PROPOSAL VOLUMES

- MANAGEMENT
- TECHNICAL
- FINANCE

**M A N G E M E N T   R E V I E W**

- **RED TEAM**
- **MANAGEMENT COUNCIL**
- **REVISE**
- **DELIVER**

AIR FORCE PROPOSAL REVIEW



A I R F O R C E R E C E I V E S P R O P O S A L

● ANALYZE PROPOSAL

● STRATEGY

**I D E N T I F Y   T E A M   M E M B E R S**

*any more information - 13 - 11/13*

- DESIGN
- LOGISTICS
- MANAGEMENT
- T & E
- FINANCE

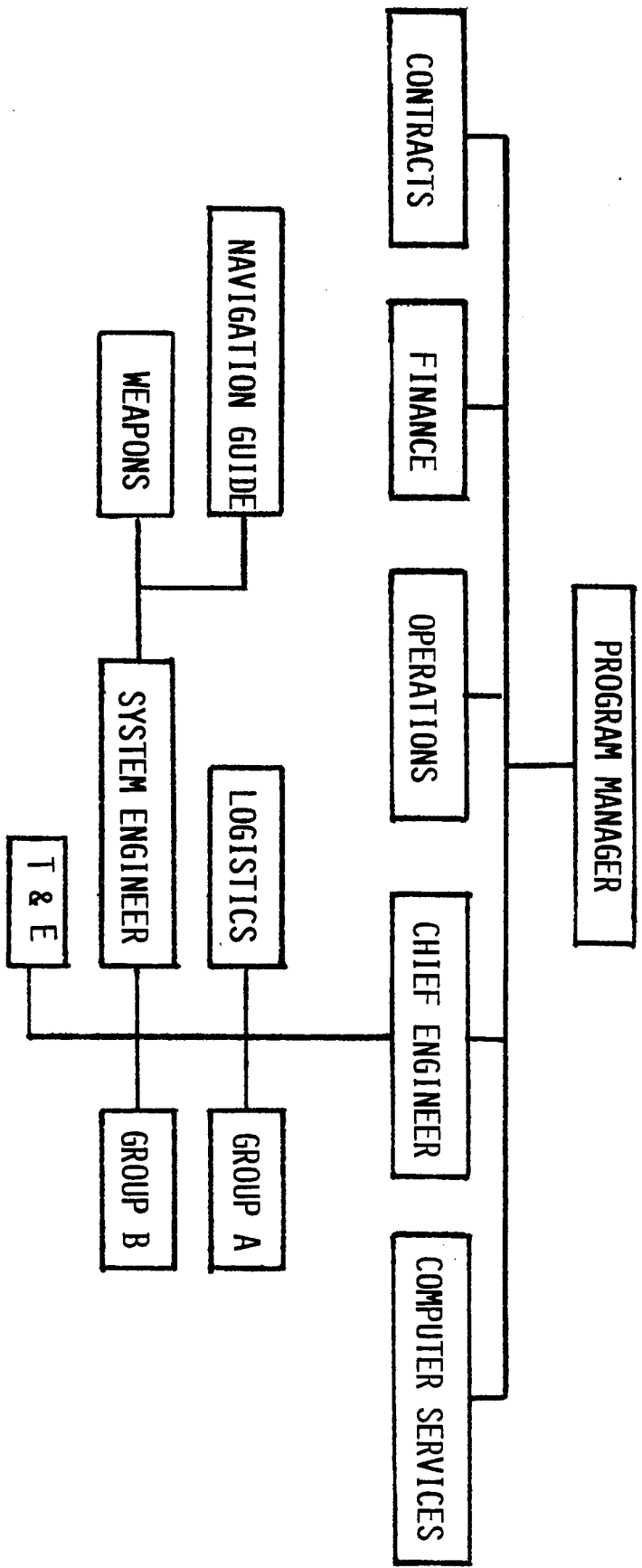
fact. Finding } <sup>Summary</sup> findings  
in action

**STRATEGY**

- C. I.'s (Customer Inquiry)
- CLARIFICATIONS = state what this officer detailed response to help items that may not have been allowed in pub paper or the proposal doc.
- DEFICIENCIES

opportunity to justify  
ability to provide proposal  
approval.

BOEING FACT FINDING MEMBERS



**F A C T F I N D I N G O B J E C T I V E S**

● **FOR THE CUSTOMER**

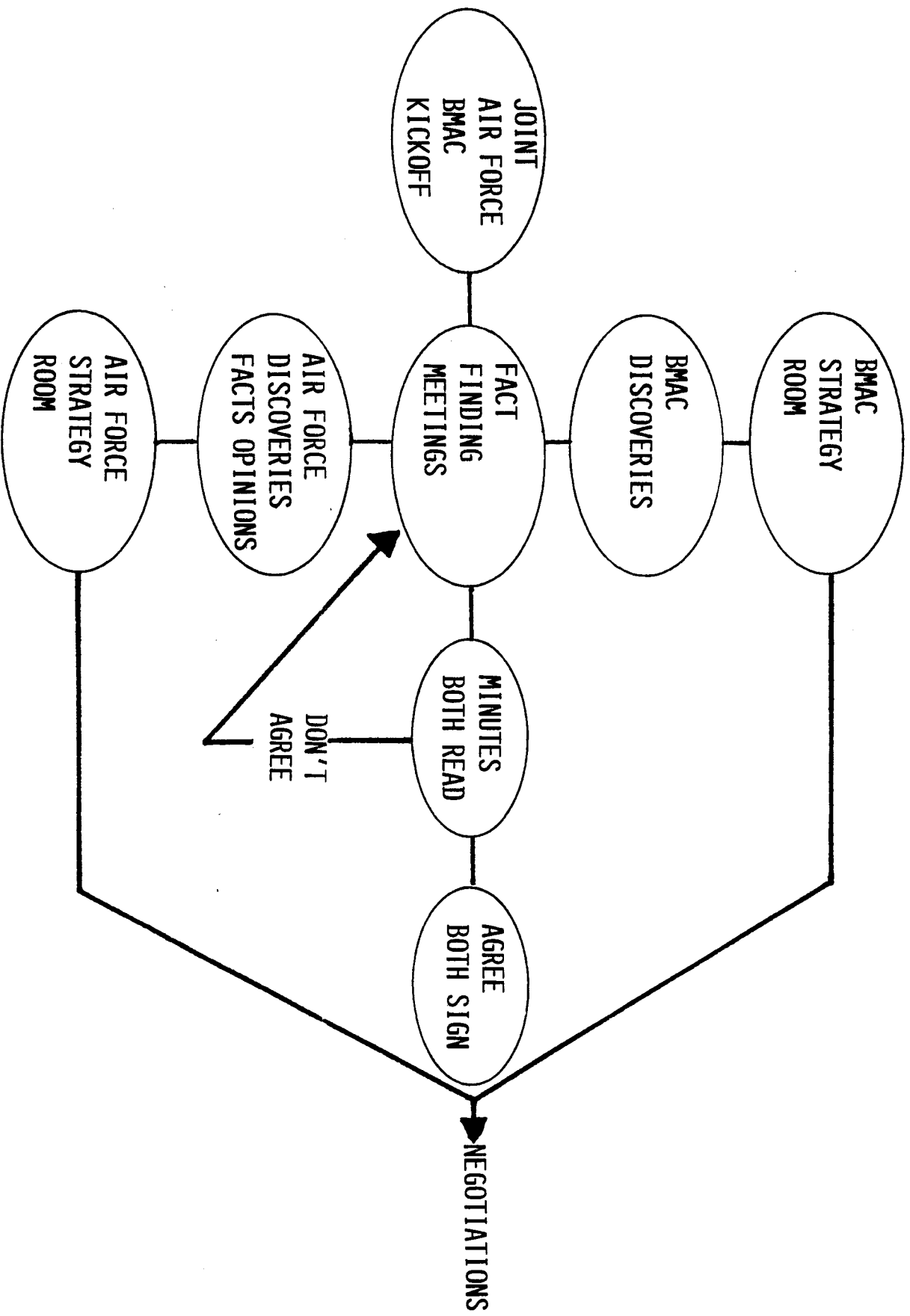
- UNDERSTAND PROPOSAL - BMAC RATIONALE AND TECHNIQUES
- ISOLATE FACTS, JUDGMENT AND OPINIONS

● **FOR BMAC**

- PROVIDE FACTS
- SUPPORT BMAC POSITION



FACT FINDING SEQUENCE



SOME THINGS TO EXPECT IN FACT FINDING

- ATTEMPTS TO DISCREDIT BMAC POSITIONS
- WILL BE ASKED TO AGREE WITH CUSTOMER *This is fact finding not negotiation*
- REQUESTS TO SUBSTANTIATE JUDGMENTS, FACTORS AND STANDARDS
- IMPATIENCE

SOME THINGS TO BE ALERT TO  
DURING FACT FINDING

*Trust, no rfp may be in negotiations & you may*

- NEGOTIATIONS HAVE STARTED
- IF WE ARE DIVIDED - WE'LL LOSE
- THE PROPOSAL IS OUR OFFICIAL POSITION!!
- BE PREPARED. READ THROUGH THE PROPOSAL - REVIEW RFP & SOW
- CUSTOMER WILL CONSIDER YOU TO BE THE AUTHORITY WHEN YOU SPEAK
- DON'T TAKE COMMENTS PERSONALLY, ASSUME THERE IS A VALID REASON FOR THE COMMENT/QUESTION
- DON'T INTERJECT YOUR FEELINGS!

F A C T F I N D I N G H E L P F U L H I N T S

- DO NOT UNDERESTIMATE THE WORK THE CUSTOMER HAS DONE OR THEIR UNDERSTANDING OF THE PROPOSAL
- UNDERSTAND THE QUESTION - ASK THEM TO REPEAT THE QUESTION. DON'T HELP THEM ASK THE QUESTION
- ANSWER THE QUESTION IF YOU ARE SURE YOU KNOW THE ANSWER. IF NOT, DEFER UNTIL YOU DO
- GIVE POSITIVE RESPONSES
- LISTEN
- DON'T NEGOTIATE
- BE PATIENT

FACT FINDING HELPFUL HINTS  
(CONTINUED)

- COOPERATE
  - OUR PURPOSE IS TO ANSWER QUESTIONS
  - THE CUSTOMER HAS THE RIGHT TO ASK QUESTIONS
- BE HONEST
  - IF YOU DON'T KNOW THE ANSWER - SAY SO
- BE RESPONSIVE
  - ANSWER QUESTION CONCISELY AND TO THE POINT - NO MORE
- REPORT BACK TO KEY PROPOSAL MANAGERS

**F A C T F I N D I N G S U M M A R Y**

- **UNDERSTAND THE RATIONALE OF THE TASK SHEETS**
- **HAVE GOOD DATA - HISTORICAL FILES**
- **PREPARE FOR FACT FINDING (OR DON'T COME)**
- **BE PROFESSIONAL**
- **AFTER THE MEETING - MEDITATE**
  - **WEAK AREAS**
  - **STRONG AREAS**
  - **WHAT DID WE LEARN**

**DOCUMENT FOR:  
YOUR FILES  
PROPOSAL TEAM**