

EFFECTIVE TEAMS. THE HOLY GRAIL?



Teamwork is one of the most effective methods to achieve proposal success - and one of the most enjoyable, when it works. ([Image by StockSnap from Pixabay](#))

Interested in learning what makes effective teams? They are not the Holy Grail! This post came out of a session at BPC Orlando in 2019, updated here with new content. It was inspired by a speaker who got the attention of the audience by opening his presentation with this observation on proposals:

“Doing the impossible with the unwilling for the ungrateful.”

And we’ve all been there, haven’t we?

In sum: as proposal managers, we try to organize opportunities to bid on the right ones. We help subject matter experts contribute. PMs support writer efforts to create compliant and compelling content. Then there's the job of scheduling gate reviews and coordinating with finance people for cost proposals. At the end of the day, we deliver documents to production departments for a timely response. Sleep is optional. Meals are what's on the conference table.

The PM role works with a diverse group of people inside the organization. Add consultants from outside for a dash of complexity. Then, toss in a management team with a mandate to grow the business. Lacking the right approach, it’s a recipe for immediate disaster. Worse, long-term failure to thrive as coworkers is just one consequence. The scars of failed proposal teams litter the landscape of proposal management, leaving residual damage everywhere.

TEAMS: THERE'S A FORMULA TO CAPTURE THE DIMENSIONS OF SUCCESS.

Successful proposals hinge on effective teams and teamwork. After action review of bad experiences reveals five key factors that, if not addressed, undermine proposal teams, wreak havoc on proposal managers, and result in poor scores during evaluation.

In our experience at Strategy Horizon Consulting, these factors are:

1. Management Support

Who's in charge here? The Proposal or Project Manager (PM) is an essential leadership role and the supervising manager must back up the PM's authority, assignments, and timeframes.

2. Structure

Next, ask "What are we doing?" Team structure should relate to proposal structure. That means clear assignments of activities to relevant members of the team.

3. Role Definition

At the same time, make it obvious "Who's doing it?" Clear role definitions for all participants must distinguish their responsibilities distinct from other members of the team and their accountability to meet deadlines.

4. Communication

What's happening? Frequent communication "keeps everyone on the same page" and ensures that the proposal manager identifies and addresses problems.

5. Intervention

Lastly, "Where are we?" Proposals can go wrong at a moment's notice. Proposal managers must recognize trouble. Then, intervene with the team to get back on track.

The story below combines multiple experiences into one, worst-case scenario: What Not To Do.

PROPOSAL? WHAT PROPOSAL?

Company X was working on a complex bid with a 30-day turnaround. It was the right Go/No Go: a fit with capabilities, solid past performance; and available boilerplate. Furthermore, there were available SMEs to provide expert support.

So, What happened next?

- The Proposal Manager (PM) had years of experience at a large company with substantial proposal resources but new to this company. Her outline had assignments, timeframes, and full story-boarding.
- Initially, she scheduled a conference call and distributed the RFP and proposal materials to the SMEs the morning of the call.



- The call went well, with no questions or comments from SMEs about the two-week turnaround for sections.

In the meantime...

- After the two weeks elapsed, the Proposal Manager viewed the SharePoint folder she created for draft documents and checked for emails with expected content. There were no emails. None of the SMEs completed their assignments.



- In the aftermath of this shocking development, the VP acted unilaterally to remove the PM and SMEs from the team.
- Subsequently, the VP brought in consultants to finish the proposal with two weeks left before it was due.
- The result? A close loss to a major competitor, and the PM resigned without notice.

FAILED TEAM, FAILED PROPOSAL



What happened? Let's take a look.

- ✘ **Management Support.** Does it make sense to turn over a major opportunity to a new staff member? Probably not. And, when the SME engagement failed, shifting leadership to a team of consultants provided little in the way of support to the PM role.
- ✘ **Structure.** Outside of the reporting structure between the PM and VP, there was little structure to the group working on content. The PM made assignments to individual SMEs, but there was no management oversight outside of the Development team. No oversight, no accountability.
- ✘ **Role Definition.** When working with SMEs who have day-to-day responsibilities, it is essential to clarify their roles on the team. Assigning sections to them needs to take into account what other responsibilities they have and the extent to which they can and have time to do the proposal.
- ✘ **Communication.** **It was actually a wake-up call, not a kick-off call.** Was the presentation so good that no one needed additional information? Hardly. The lack of questions, discussion, or comments showed that people on the line were not engaged. And, there was no follow-up to determine if SMEs understood the assignments and were working on them. The outcome? The lack of results came as a complete surprise to the PM.
- ✘ **Intervention.** Ultimately, the intervention was both harsh and untimely. It was also expensive and unsuccessful. Removing responsibility for the entire proposal made the PM feel sabotaged. The

proposal then went to consultants without a background in the opportunity, requiring extensive work and rework on an emergency basis. Utter chaos.

A narrow loss to a major competitor? Not a team experience anyone needs.

FINDING THE HOLY GRAIL

Major proposals are not tests for new managers. The concept of "Sink or Swim" has no place in a team. And, groups of people without buy-in or direction are not teams. Many companies lack the time and resources for advanced team-building. They need a way to create "just-in-time teams" that work well together. While that is not easy, it is doable. With the right oversight, structure, and support, people can come together quickly and perform effectively.

WE CAN HELP

Strategy Horizon consultants have experience with all aspects of proposal management, including facilitating high-performing teams. We are ready to help your team win with 5-Factor proposal support:

- 1. Management.** As your consultant, we work closely with senior management to assess the competitive opportunity, document the need for subject matter experts, and create realistic timelines and review processes. We also create supportive documents, including the writers' outlines, compliance matrix, and competitive analysis to articulate win themes. Identifying strong proof points for use in the proposal is one more way organize to support project success.
- 2. Structure.** Who's on first? Working with your Business Development organization, we map staff to scope to ensure a team structure that covers the scope of work, aligns content creation with SMEs and proposal writers - and connect to you effective, external resources if you need them.
- 3. Role Definition.** We support the proposal team with structure and oversight to ensure SMEs understand their assignments, if any, and can complete them. We maintain contact with the team, building trust, so team members feel empowered to ask for help they need to complete the work.
- 4. Communication.** Communication plans are an important tool for teams - and communication vehicles help ensure everyone is "in the loop." We can use a Microsoft Teams site, simple email, Zoom calls, and other methods to keep the whole team informed of the status - including daily huddles to quickly share status and surface issues.
- 5. Intervention.** Working with the team or with individuals who are part of the team, we quickly provide insight, ideas, editing, and, yes, writing, to help keep things on track for a complete, timely, compliant, and competitive proposal.

WANT TO DO IT YOURSELF?

We recommend the Association of Proposal Management Professionals (APMP) member, certification, and Body of Knowledge. APMP can provide the know-how – and your company can provide the leadership to bring it all together. Learn more about APMP here: www.apmp.com

