The Mail.
Open it. Read it. Answer it.

WHAT ARE WE TALKING ABOUT?

In the proposal management field, we call a complete and succinct response "answering the mail." Answering the mail is the foundation of a compliant proposal. Each client request for proposal (RFP) states project requirements – people, processes, tools, products to deliver, and reports, for example. This request outlines the work clients want to purchase. The proposal describes who will do it and how they will complete it. There is a commitment to perform the work according to specifications – so answering the mail is an important achievement. It means the proposal describes the company's approach thoroughly and accurately. That is a good thing.

How hard can that possibly be? Turns out, it is plenty hard.

Often (too often) proposal professionals and their subject matter experts write their responses before reading the requirements in full. This occurrence is the result of a communication obstacle psychologists term inference-observation confusion.[i] We are more familiar with the term "jumping to conclusions" (JTC). A form of cognitive distortion, individuals make inferences about requirements, form conclusions without sufficient information, and respond without full understanding.

> "Jumping to conclusions is bad exercise."

In effect, they are jumping to solutions (JTS). They may think they are answering the mail, but it is a letter they sent to themselves.

In real life, we can have the opportunity to explain ourselves when we JTC. We can back the conversation up, gather additional information, and correct our inaccurate assumptions and mistaken responses. With proposals, we may not have that chance.

Most RFPs include information that explains how the client will evaluate bids. These evaluation criteria may include statements about what the client believes is important and may also assign points to sections of the proposal, including approach to the work and cost. Importantly, the evaluators rely on the written proposal to make their assessments. They may, or may not, request clarifications of any bidder's submission. For example, a recent request for proposal stated,

> *"Discussions may be conducted by the procurement officer with any Offeror that submits a proposal determined to be reasonably susceptible of being selected for award. Proposals may also be accepted without such discussions."*

Failure to understand the requirements and jumping to a solution can lead to losing the bid if you misunderstood the requirements and *did not answer the mail*. Even worse, you may have to perform to the standard and/or conduct the work based on your mistaken perceptions. Unfortunately, that situation can lead to losing the contract for failure to perform according to requirements – a performance issue that can disadvantage a company for years.

HOW DO YOU PREVENT JUMPING TO THE SOLUTION?

Too many times, proposal writing begins before companies read and discuss the RFP, research the requirements, ask questions, and plan the response. The Proposal Team is busy with cutting and pasting, using a previous proposal for the same work or a recent proposal for similar work. Unexamined assumptions and mismatched requirements lead to insertion of irrelevant text to fit a hasty and irrelevant solution. After a painful Red Team, getting to basic compliance can require massive, expensive, and time-consuming editing. However, teams **can** use detailed assessment, thoughtful planning, careful editing, and indepth review for better results.

OPEN THE MAIL

Assume you receive a bill in the mail from the water company. Do you pay it without opening it to see how much it is? Of course not. The same thing is true of RFPs. First "open it," that is, make sure you have the complete RFP, including forms, attachments and model contract if relevant. Make sure it is in a location that other members of the proposal team can access.

READ THE MAIL

The next step is reading the documents from start to finish to understand the expectations. Who is the client? Do you know them? When is it due? What is the scope of the work? How will the client evaluate responses? Is there an incumbent? Can you ask questions? A thorough review of the RFP and all its files (yes, including the attachments and model contract) is the second step.

For proposal managers, this step will help to identify likely members of the proposal team. Expect this team to read and discuss the requirements in detail until everyone understands what the RFP says. List the requirements and the approach to meet them to aid in this discussion. Research "buy or build" decisions as needed. Evaluate the business approach of possible competitors. Assess the odds of beating them. What would it take for you to win the business? Your solution will answer that question. Document it. In detail.

ANSWER THE MAIL.

Now you have a compelling solution and are ready to begin writing the proposal. But first, plan the content. Create a compliant template for the response that follows RFP directions. Including text from the RFP can help writers by keeping the requirements in front of them as they work. Include data that support the effectiveness of your solution – "proof points." Include statements that answer the question "Why us?" These statements are win themes and they position your response for a positive evaluation. This approach is actually less time-consuming than rewriting!

Simplify the process with cautious use of prepared content. Do you have boilerplate for past performance descriptions that you can update? Do you have resumes, job descriptions, biosketches of important personnel, workflow descriptions and charts for major performance requirements? Do you have relevant, recent, and positive references? These materials can help you reduce the level of effort for standard components like staffing plans without relying on tired content from old proposals. Once you populate the template with these standard responses, your team can add original content to describe your solution, blending in proof points and win themes to convince evaluators your proposal is the best choice for the client. Your "smart template" guides the writer to create content that is accurate and complete – content that answers the mail.

CONCLUSION: THESE THREE STEPS CAN HELP YOU WIN THE BUSINESS

1. Open the mail: make sure you have all components of an RFP before beginning a response.
2. Read the mail: thoroughly review and assess the requirements to drive your solution.
3. Answer the mail: Plan and write your response with succinct and complete content.

Got a question? Contact me at cweinmann@strategyhorizon.com Or contact APMP.

The Association of Proposal Management Professionals (APMP) is the place to start. Visit APMP here: https://www.apmp.org/page/AboutAPMP

[i] Hamilton, Cheryl (2011). Communicating for Results: A Guide for Business and the Professions. p. 162. ISBN 978-1-4390-3643-3.