WHAT DO THEY REALLY WANT?

It's Thursday, October 1. Your boss is on vacation for the next ten days. You just got back from lunch and found a solicitation on your desk, with a note from one of the principals: "We need to submit on this one. Please take care of it."

Inhale . . . slowly. Exhale . . . slowly. Do it again . . . more slowly. OK. Here's what you do.

1. Find the due date and time. Determine whether or not it's an emergency. It isn't? You have until 4:00 pm on Friday, October 16 to deliver the document? OK, no problem!
2. Find the delivery address. Is it local or must it be sent out the day before it's due? It's local? OK. That means you can finish printing and assembling next Friday morning and still deliver on time. If there are special labeling or delivery requirements, alert the mail or other appropriate staff in advance.
3. Read the solicitation from beginning to end to get a general sense of what it's about. Then grab a highlighter and read it again. What are they asking for? This tells you not only what must be included in the submittal, but how much and what kind of help you will need to be responsive.
4. Make it happen!

Obviously, step 4 is where all the work is, but you may have help, and much of the work may already be done for you.

What is the solicitation asking for? More specifically, is it asking you to submit a Statement of Qualifications (SOQ) or a proposal? They are similar, but not the same; the process is somewhat different, and includes different people.

If the client wants an SOQ, you should sit down with a principal, talk about the projects you want to present, prepare it yourself and have the principal look it over before delivery. The introductory information can come from your existing boilerplate/database or a recent SOQ. The projects should be relevant to this client's project and needs. Use the client's name and the project name often. If you keep referring to "the client" and "the project," it will look like you're using boilerplate information.

The big question here is whether or not to include resumes. The solicitation should indicate how much detail the client wants regarding staffing. It may ask you to describe team members (short blurbs), it may ask for resumes, it may ask for an organization chart, etc. If there is no specific indication, keep it short, key staff members only, perhaps a paragraph and three or four project bullets on each one. Unless asked, it is probably a good thing to avoid using an organization chart or a schedule until you have sufficient detail about the project scope and timeframe.

If the client wants a proposal, the solicitation should contain enough detail to help you select the most appropriate project descriptions, select the right resumes and tailor them properly, prepare an organization chart and schedule. The solicitation will probably ask for a project understanding and approach. It may list some specific challenges and ask how you would respond to them.

The general procedure will be similar to that for the SOQ, but your strategy discussion should include the technical person who will write the understanding and approach. Also, you'll need to talk about specific project staffing and potential teaming with other firms. In this meeting, make assignments to all contributors, with due dates. Then, work backward from the delivery date to develop a proposal schedule that ensures sufficient time for writing, review, correction and production.

Developing a proposal calendar is not the easiest thing in the world. Each team member already has commitments, each one has a different agenda, and each has a supervisor pulling him in a different direction. The big secret here is to ask technical folks only for the technical information you don't have. No matter how much they try, DON'T let them get involved in the page layout, the color and/or content of the header and footer, the type font and size, or anything else that doesn't require technical education and knowledge.

As you determine the level of technical (or other) review the proposal will require and identify the appropriate staff to perform such review(s), check their schedules immediately to see if they are going to be in the office and available when you need them.

Let's say the solicitation referenced in Item 1 above is a Request for Proposal (RFP) from the City of Dallas/Dallas Water Utilities and the project involves design for the replacement of 100,000 linear feet of water and wastewater lines in a number of locations. The table below takes you through a hypothetical scheduling process (although you'll actually develop the schedule working backwards from the due date).

Day*	Date	Activities
Thursday	October 1	Develop a quick proposal outline based on the requirements of the RFP. Sit down with the Principal, flesh out the outline, and determine appropriate technical people to write required sections (Project Understanding, Approach, etc.). Set a time for a Kick-Off Meeting on Friday 10/2 and invite technical and graphics staff to join you and the principal. Give them the RFP and the outline (which will become the meeting agenda). Ask them to think about appropriate projects, staff and M/WBE firms to include.
Friday	October 2	Hold the Kick-Off Meeting. Discuss the proposal outline and compile a list of all the projects and staff to be included. Identify the "win themes" which will secure the assignment for your firm. Identify the role of the M/WBE firm(s) to achieve relevant goals. Identify specific individuals and their project roles, and sketch out an organization chart. Make writing and graphics design assignments as necessary, with a deadline of end of day Tuesday, 10/5.
Monday	October 5	Assemble pertinent resumes and project descriptions in one electronic location. If a resume has not been updated in a while, call the person, describe the project and ask if they have anything relevant to add to their resume. Ask for information by the end of the day. Check project descriptions to see that you have all the information required by the RFP. If there are gaps, contact project managers for information. Contact appropriate M/WBE (and other) subcontractors to confirm their participation and give them your list of information needs and deadlines.
Tuesday	October 6	Tailor resumes as appropriate. If anyone gives you new information that also needs to be added to their "base" resume, highlight it and put the page aside for action after the proposal is delivered. You don't want to lose the update, but you don't want to play with their master resume now. Complete and print a set of resumes. The principal can review these whenever he/she gets a chance.
Wednesday	October 7	Collect information from others, add it to your electronic file and begin using it to flesh out the text. Fix the formats and make sure all projects have all of the required information. As appropriate or required, put information on required forms (standard City of Dallas process). As you make these inserts, tie the information to your "win themes" and/or tell the client why this specific piece of information is important to him.

Thursday	October 8	Identify information gaps. Identify the appropriate information to fill each gap and request help. This can be done via email, phone or face-to-face. If the person is in the same office as you, choose face-to-face. They might be able to answer the question and send you on your way happy. If not, choose the phone. Interactive contact is better, faster and more accurate.
Friday	October 9	Fill in the blanks, check for consistency in formats and usage, print and distribute to technical reviewers. Draft the cover letter and determine if it should be signed by the Principal, the Project Manager or both and let the appropriate party(ies) see the draft.
Monday	October 12	Collect comments from technical reviewers and make revisions. Make a final cover-to-cover read-through yourself and print copies for the "Red Team" (final review – they should see 99% complete, pretty much what the client will see). Include the cover letter.
Tuesday	October 13	Hold "Red Team" review meeting, maybe as a working lunch. Get members in the same room to talk about their comments. Compile a master revision copy incorporating all accepted comments of all reviewers.
Wednesday	October 14	Make final revisions and print one copy. Make one scan through the document yourself to be sure every blank was caught and every revision was inserted. Fix if necessary. Then print and assemble the required number of copies.
Thursday	October 15	Flip through a few copies at random just to check. Deliver the proposal today, one day early.
Friday	October 16	Start working on your next crisis. The proposal has already been delivered.

*Note that there are no Saturdays or Sundays in this schedule. I told you it was hypothetical!

If you are using major graphics, try to get the graphics person involved early. Knowing the thought process that led to various decisions may help them design front and back covers, page layout, organization charts and other graphics that enhance the ideas you're trying to communicate here. Also, early involvement will make them feel like part of the team, which is also important.

The above schedule leaves a one-day grace period in case an emergency comes up. This could include losing your M/WBE team member, learning that an additional M/WBE or other subcontractor would be very helpful in winning, learning about an issue of concern to the client, etc. If nothing like this comes up, DO deliver the proposal early, but only one day early. Two days early is risky. The client could lose your package, or there might be an addendum/revision that will require changes in your proposal.

Now look at your own overall schedule. If possible, for the first few days of the SOQ or proposal effort, try to deal with emergencies in the morning and reserve the afternoon for the SOQ or proposal. Toward the end, you may have to let things sit until they become emergencies, or find someone else to handle the interruptions.

Don't be afraid to ask for help. In the long run, it is better to admit you need help and turn in a winning proposal, than to pretend you could do it alone and have the client tell your principal it was the worst proposal he'd ever read.

Best tip: slow down and get it right the first time. In the end, that's **always** faster than moving too fast and having to do things over.

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