

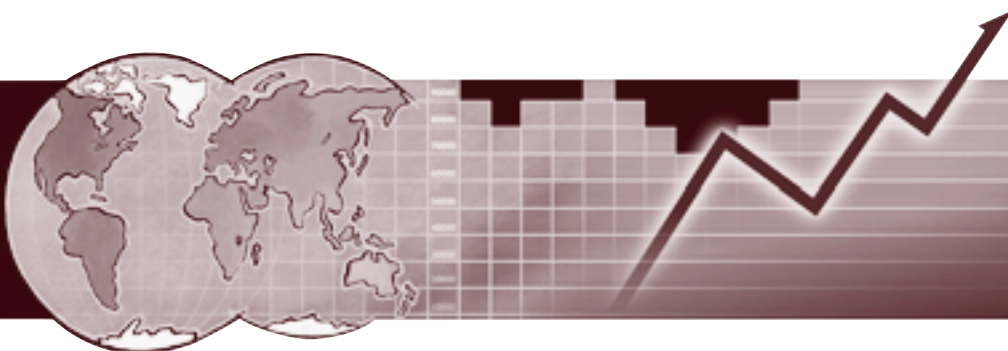
THE
White Paper

S E R I E S

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THE KICKOFF MEETING

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Introduction

Of all the milestones in the proposal process, none may be more important than the kickoff meeting: important for the company; for the proposal core team; for each contributor; and, ultimately, for the customer.

Too often, however, the core team (e.g., account manager, proposal manager, solution leaders) hesitates to plan for and schedule the official kickoff until the request for proposal (RFP) is on the street. Then, because the clock is ticking toward proposal submission, the kickoff meeting is held as quickly as possible so that contributors can get to work, thereby increasing dramatically the likelihood that the seeds of chaos have been sown into the entire response period, especially the final days.

Properly conceived, the kickoff meeting is not just a symbolic gesture whose real purpose has long been forgotten, leaving little more than a standardized ceremony of corporate clichés before the storm. The kickoff meeting is, or should be, the moment of truth for the people who must plan and execute the proposal effort, because it allows you to begin applying three principles fundamental to proposal management:

- ▶ **Teamwork:** Kickoff will most likely be the only time during the entire pre- and post-RFP process when the entire team will be together. Therefore, the kickoff meeting is the golden opportunity to get the team motivated, to establish lines of communication and coordination, and to distribute critical information.
- ▶ **Project Plan:** Kickoff is the transition milestone between planning a proposal and actually creating one. The core team must “get its ticket punched” by demonstrating during the meeting that substantive work has been done to prepare for the equally substantive work contributors will be expected to do. The proof of that early planning is a published proposal project plan.
- ▶ **Process:** Kickoff is the time when proposal contributors should learn the larger, more strategic messages regarding the opportunity, the company’s offer, the proposal strategies, and so on. However, they should also be given the specific process and tools for planning, designing, and writing their sections. The process could include such elements as a draft executive summary, page limitations, information on visuals, format requirements, sources and uses of boilerplate, review and revision cycles, schedules, and explanation of how preparation techniques such as mocking up and storyboarding will be used to design the sections before writing them.

Problem

Either the members of the core team have done the difficult spadework for a focused, organized, strategically sound approach to the proposal, or they haven’t. If they have, then they demonstrate their real understanding of a simple fact: The chaos of proposal work cannot be eliminated, but it must be controlled. Otherwise, the chaos will spread and multiply like a hidden design flaw during the kickoff meeting, and every member of the team will pay the price for conducting a

salvage operation during the last days of the effort. One of the surest signs that chaos is alive, well, and about to enjoy unrestrained growth is a kickoff meeting in which the proposal manager makes some opening, cold oatmeal remarks while an assistant at the back of the room begins distributing toasty-warm photocopies of an RFP. Then, with feigned enthusiasm, the manager says, “OK, gang, let’s all read this RFP and meet again day after tomorrow to see what we’re up against.” The clock continues to tick. This is virtual planning with a vengeance, and we need to remember a Golden Rule of winning work: *Virtual planning is virtually useless.*

Here, then, are some other signs of proposal doom:

- ▶ A kickoff meeting attended by some but not all of the team members
- ▶ A kickoff meeting attended by all the proposal contributors but no one else
- ▶ A kickoff meeting in which Rock Stone, VP of Everything, says nothing except “This one is a must win! And remember, I care!”
- ▶ A kickoff meeting dominated by negative messages expressed in positive tones:
 - No one will be expected to work after midnight or before 6:00 a.m. You need your rest.
 - If everyone produces, the number of working weekends will be held to four, maybe five, six at the most. Tops. Really. Tops. Max.
 - Cancellation of vacations has already been taken care of, so you don’t even have to think about that detail. No one can say we don’t take care of our people!
 - Lunches will be provided every day . . . by automatic payroll deduction, so you don’t have to mess with the paperwork.

- To keep things simple, the schedule has only one milestone: the submittal date.

Approach

The benefits of an effective kickoff meeting extend far beyond the meeting itself. In fact, a direct correlation exists between the quality of the proposal kickoff and the actual proposal, because what the core team does to prepare for the kickoff meeting drives the preparation of the proposal. Keep in mind that every person who has ever walked into a kickoff meeting has at least three questions buzzing around in his or her head:

- ▶ What am I supposed to do?
- ▶ How am I supposed to do it?
- ▶ When do I have to have it done?

It is the core team’s responsibility to provide definitive answers to these questions, plus a host of others, as part of the kickoff meeting.

In fact, a core team would be well advised to return to the three principles of proposal management—Teamwork, Project Plan, and Process—and use them to plan a kickoff meeting that actually moves the effort forward.

Real planning, not virtual planning, is the key internally and a competitive weapon in the marketplace. Why? Because if you really know what your competitors are doing (or not doing), you’d see that in most cases, they’re doing the virtual planning that gives proposal chaos a new lease on life.

Teamwork

A proposal team should not be what is often referred to as a collaborative team (e.g., a group of friends who get together on Saturday afternoon for a touch football game: everyone has a plan, everyone wants to be the star, everyone talks in the huddle, and so on).

Rather a proposal team should be a hierarchical team (e.g., a group of highly skilled specialists who, like professional football players, have carefully defined responsibilities, work as a single unit, and recognize clear lines of authority). Furthermore, they not only understand their own duties but also how their contributions fit into the grander scheme of things.

The key for proposal management, then, is to recognize that (1) the team consists of many specialists needing focus and direction, and (2) in a very real sense the full team often includes people other than those officially tapped as contributors. The latter should, of course, attend the kickoff meeting. But the following checklists reveal that others might be invited and would therefore become invaluable proposal "contributors" simply because they have been recognized by proposal management:

- ▶ **VIPs:** These are one or more executives to represent the significance of the upcoming effort and to speak in specific terms (rather than in locker room "peptalkese") about the importance of the proposal to the company's long-term business plan and strategic goals.
- ▶ **Functional area managers:** Once they feel included and understand the details and the importance of the proposal, these real

managers of the team members can actually support their people on the team and encourage them rather than divide their loyalties between their ongoing functional area responsibilities and the ad hoc proposal work.

- ▶ **Support staff:** Inputters, secretaries, filers, editors, artists, and production people too often are viewed as "grunts." They are actually critical contributors, especially in the eleventh hour when the proposal must get through the system and out the door.
- ▶ **Spouses:** The invisible but very real other half of many proposal contributors. They need to be recognized for the support and sacrifices that a proposal effort usually requires, including lost weekends, canceled plans, and many evenings when the family must fend for itself.
- ▶ **Field representatives:** These human sensors are out there picking up signals from the client and the competition. They need to be brought in from the field, debriefed, and made to feel a part of the company in general and the proposal team in particular. Remember, everything done on a proposal begins and ends with information.
- ▶ **Review teams:** The members of the pink and red teams too often are not even assigned until just before their reviews commence. The review teams should not participate in the actual creation of the draft proposal, but once identified and made a part of the team, they can begin meeting early in the response period to establish their methods for reviewing the drafts.

A team is not just a collection of people, it is a state of mind. Proposal managers who understand this concept can use the kickoff meeting to generate among all team members

the energy and camaraderie that will carry them through the inevitably difficult days that lie ahead. The alternative is trying to get a proposal contributor excited about the work while his or her VP and functional area manager don't know what's going on. Furthermore, the graphics, editing, and production people have declared open season on the next person to dump a proposal section on them.

Project Plan

Probably no document a company creates is more complex and more stressful on people and systems than a proposal. It requires careful management of a particular kind:

- ▶ Management of a project but also management of a hybrid document that is at once a finished product and a combination of sales and technical information on future unfinished products or yet-to-be-delivered services.
- ▶ Management of technical people doing what they were hired and trained to do but also management of those same people doing what they were not hired and trained to do—write parts of a proposal.

Given the challenge of managing writing and writers under difficult circumstances, the proposal core team needs to follow this basic principle:

A plan does not exist until it is written. Plans communicated *orally* do not exist, and they provide the most blatant example of virtual planning. And remember, *virtual planning is virtually useless*.

Applied to a proposal effort with all its attendant complexities, it means that a proposal project plan must be developed and distributed no later than the kickoff meeting. It's actually better to distribute the plan a few days prior to the kickoff meeting so that every team member has a chance to review it and formulate questions that can then be addressed during the meeting. Furthermore, this plan establishes the core team's credibility because it is tangible proof of the substantive work that has been done to prepare for the proposal effort.

Figure 1 shows the elements of a comprehensive proposal project plan as a deliverable to the kickoff meeting:

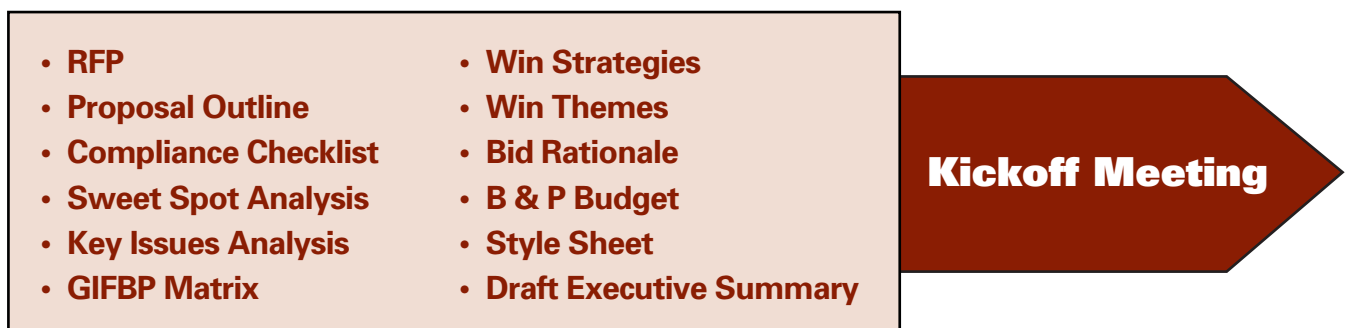


Figure 1

Instead of distributing photocopies of an unanalyzed RFP at kickoff, the core team distributes a plan of action, including full RFP analysis. With a precise and comprehensive proposal project plan, the kickoff meeting will shape a team working on focused assignments and recognizing clear lines of direction. Without the plan, the kickoff meeting will inspire people to do little more than daydream about last Saturday's touch football game.

Process

One of the main reasons for frustration on proposal work is that contributors—highly trained professionals who need specific physical and intellectual tools to do their jobs—are tossed into their proposal assignments without the proper tools and a process for using them.

Much of a kickoff meeting should be devoted to introducing, explaining, and demonstrating the process and the tools (a system) that will be used on the proposal. The critical factor is the core team's willingness to not only talk the system but also to show—via its own pre-kickoff designing and planning—how it works.

Perhaps the core team frontloaded the proposal effort by drafting the executive summary prior to kickoff, thus giving credence to the process-related issue of designing a proposal top-down but also showing the specific tools that were used to plan, design, and draft the executive summary: storyboards containing visuals, strategies, and themes; full-page mockups integrating the visuals, themes, and text; and the hardware or software used to prepare hard copy of the draft.

The point here is as simple as it is undeniable:

Contributors must never leave a kickoff meeting with unanswered questions or serious doubts regarding the system (the process and tools) they will be expected to use quickly and skillfully.

The following checklist provides examples of some of the key system-related issues that a core team might consider as they prepare for a kickoff meeting:

- ▶ Top-down proposal design: executive summary to the volumes to the sections
- ▶ Limitations on pages and visuals for each contributor
- ▶ Format requirements
- ▶ Mock-ups of all sections to determine effective design
- ▶ Storyboarding for themes and visuals
- ▶ Sources, uses, and tailoring of boilerplate
- ▶ Sources and uses of templates
- ▶ Review and revision cycles
- ▶ Hardware and software commonality
- ▶ Master copies of the volumes
- ▶ War room walls as layout areas
- ▶ Style and voice in the text
- ▶ Proposal library

Summary

Producing a superior proposal at a reasonable cost means that those in charge must hear the clock ticking before the RFP arrives and must prepare for a kickoff meeting that will control the chaos of the response period. After all, chaos costs money, both short term (an eleventh-hour salvage operation) and long term (proposals that fail to move the company toward contracts). Chaos also chews up people and other resources without mercy, and the result is often mental mutiny among team members who try to amuse themselves by taking daily, even hourly, readings on how many *os* there are in *doom*.

A quality kickoff meeting provides proposal management with its major stay against chaos; a means of demonstrating pre-RFP commitment and leadership; and a way of creating a team that can function smoothly because it has identity, direction, focus, and the proper system for success.



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About the Author

David Pugh is cofounder and executive vice president of Lore International Institute and an internationally respected authority on marketing, sales, and proposal training.

He has led workshops throughout the United States, Canada, Brazil, Hong Kong, Japan, Saudi Arabia, New Zealand, Australia, England, Scotland, South Africa, the Netherlands, and Norway. He is one of the key architects of Lore's proposal development training and services. His extensive knowledge of proposal design and writing techniques has helped generate billions of dollars in signed contracts for Lore clients with whom he has consulted.

David has taught for more than 25 years in both the academic and business worlds. He has conducted hundreds of workshops for more than 10,000 Fortune 500 personnel and has helped thousands of engineers, marketers, sales executives, and managers improve performance by providing practical, down-to-earth techniques that work. He is an award-winning instructional designer, a primary developer of Lore's business development curriculum, and a popular keynote speaker at regional and national marketing and sales conferences.

As a master instructor and former head of Lore's Marketing, Sales, and Proposal Programs Division, David has hand-picked a faculty that matches his standards of excellence in program design and delivery. He works closely with these instructors to ensure consistent quality in delivery of all training programs and consulting services.

David's education includes a Ph.D. in American Studies, Washington State University, M.A. in English, Washington State University, and a B.A. in English, Eastern Washington University.

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