

‘Win themes’ for federal proposals

Stick to a story line of three or four win themes that a busy evaluation panel member can easily remember.

When planning a proposal in response to a federal RFP or SF 330 opportunity, savvy proposal managers immediately focus on the development of “win themes.” To be sure, successful proposals have to answer each individual evaluation criterion. But in most competitions, this is not sufficient. To write a winning proposal, you have to convey to the evaluation panel a consistent, easy to understand story line: three or four themes that explain why your firm would be the optimal choice.

The cover letter and executive summary should present these themes. They should be reinforced in each section – in your description of your staffing plan, proposed program manager, technical approach, management plan, and so forth.

Why is it so important to enunciate and reinforce themes throughout the proposal? Evaluation panels are typically populated by staff members who have way too much to do. Service on the panel will take up a lot of their time, and at some point the identity of individual proposals will begin to blur. Panel members will read many proposals, cast aside a few as obviously technically inferior, but almost always will be left with quite a few that score well on individual evaluation criteria.

How can you help ensure that your proposal is one that panel members distinctly remember? Evaluation panel members are most likely to remember those that contain a coherent story line: a set of themes that are stated at the beginning, and carried through to the end.

In selecting the win themes for your proposal, you should ask yourself the following questions:

- How can we differentiate our team (i.e., our firm and our sub-contractors and consultants, if any) from the likely competitors?
- What are the three or four most important aspects of our overall approach that, in the firm’s opinion, will ensure technically excellent, cost-effective performance?
- What advantages can we offer that our likely competitors cannot?
- Is there an incumbent contractor for this solicitation? If so, what do we know about the strengths and weaknesses of that firm’s performance, as perceived by the agency? How can we counterbalance that firm’s strengths? How can we emphasize our team’s ability to avoid the incumbent’s areas of weakness?
- After the evaluation panel has read all of the competing



Dave
Alexander

**GUEST
SPEAKER**

proposals, what are the key messages that you want the panel to remember, above all else, about the proposal?

For example, you may decide that one of your key win themes is your ability to provide continuity of personnel. You can obviously articulate this theme as part of your personnel chapter. But make sure that each and every major chapter in the proposal also reinforces this theme. In the past performance chapter, for each of the past contracts you are highlighting, emphasize that your firm consistently delivered the “key personnel” you had originally proposed. In the “technical approach” chapter, find a way to emphasize that your methodology will deliver superior results because, in part, the “lessons learned” at each stage of the project will inform the next phase – a result that is best achieved when there is little or no personnel turnover on the project.

See DAVE ALEXANDER, page 8

How can you help ensure that your proposal is one that panel members distinctly remember? Evaluation panel members are most likely to remember those that contain a coherent story line: a set of themes that are stated at the beginning, and carried through to the end.

DAVE ALEXANDER, from page 6

The following are some additional examples of the types of win themes you might want to consider for a particular proposal:

- **Unique expertise.** Does your team have unparalleled expertise in areas of key importance for this contract (e.g., site conditions or a particular technical sub-discipline)?
- **Unique technical resources.** Does your team have hard-to-match resources that will be particularly important for this contract (e.g., proprietary data sets or uniquely configured equipment)?
- **Ability to start the project rapidly.** Does your team have the specific types of knowledge and experience that will enable you to hit the ground running without requiring an orientation period? (This might be a compelling theme if, for example, your research indicates that the agency is concerned about its ability to meet an externally imposed deadline, and this procurement – a key element of the agency’s ability to meet that deadline – is behind schedule.)
- **Capacity.** Does your team have a particularly large amount of staff available in each of the key discipline areas? (This might be a compelling theme if, for example, the solicitation is for a task order contract and your research indicates that there may be large peak workloads during the period of performance.)
- **In-depth understanding of relevant issues.** Does your team have an unparalleled knowledge of the key issues that provide the context for the work to be performed under this contract (e.g., knowledge of the agency’s methodological preferences or understanding of key policy issues)?
- **Diplomatic skills.** Does your team have exceptionally good diplomatic skills that will be required to perform this contract? (This might be a compelling theme if, for example, the prime contractor will be required to interact frequently with other prime contractors or the contractor will have to gather information from other government agencies in a controversial subject area.)
- **Credibility.** Does your team have an exceptionally good reputation with external parties and established, trust-based relationships that will help ensure the success of the contract? (This might be a compelling theme if, for example, the contractor will be required to obtain hard-to-obtain information on a particular industry as part of the research phase of a contract.)
- **Collegiality.** Will your team be easy to work with? (This might be a compelling theme if, for example, your research indicates that the agency recently had bad experiences where other contractors have acted in a manner perceived to be arrogant or inflexible.)
- **Adherence to administrative rules.** Will your team meet all administrative requirements of the contract, such as progress reporting, without fail? (This might be a compelling theme if, for example, your research indicates that the program office for which the contract will be performed has relatively little experience with contractors.)
- **Cost-effectiveness.** While you almost always are prohibited from presenting price/cost data in your technical proposal, you can discuss the general issue of your ability to perform cost-effectively. (This might be a compelling theme if, for example, you are responding to an RFP for a task order contract, and you believe that your hourly rates will not be particularly low compared to your likely competitors. In this case, you might want to emphasize that your firm has the proven ability

If you and your team develop a list of 10 items, then you have more work to do: you have a laundry list, not a concise story line that a busy evaluation panel member can easily remember. Distill the laundry list into a compelling, brief list of memorable win themes, held together with a story line.

to perform tasks efficiently because of your personnel’s in-depth expertise, your proven methodologies, your tight management systems, and so forth.)

- **Continuity of service.** A theme that stresses the advantages of continuity and the risk that the agency would incur by switching contractors can sometimes be compelling, if conditions such as the following are met: you are the incumbent contractor and the agency is highly satisfied with your performance; the work being performed is complex and subject to a variety of uncertainties (e.g., it requires innovative methods; relevant data is hard to obtain); the work to be performed under the new contract will be directly related to the work you are currently performing on the incumbent contract; the agency is under time pressure with respect to this work.

If you and your team develop a list of 10 items, then you have more work to do: you have a laundry list, not a concise storyline that a busy evaluation panel member can easily remember. Distill the laundry list into a compelling, brief list of memorable win themes, held together with a story line. What are the three or four most important themes? Can you write them down in one succinct paragraph? That’s great. Can you articulate them in one sentence? Better yet.

In summary, your proposal should tell a story – one that will help panel members remember your proposal as being the most responsive. Doing well on individual evaluation criteria is not enough to achieve this goal. Do yourself a favor – help panel members: a) **remember** your proposal, even after they have reviewed a dozen or so others; and b) conclude that your firm has the most **coherent, integrated ability** to respond to the needs articulated in the solicitation. ▲▲

DAVE ALEXANDER, Lincoln Strategies, LLC (www.LincolnStrategies.com). Alexander authored *ZweigWhite’s Guide to Winning Federal Government Contracts for AEC & Environmental Firms* (2nd Edition), on which this article is based. Reach him at da@LincolnStrategies.com.