

Lessons learned—Better Proposals or “Drinking Your Own Bathwater?”

By Rob Ransone

If you are like most proposal professionals, one of the first things you try to do after submitting a proposal is conduct a “Lessons Learned” exercise. Unfortunately, many companies fail to do this. The ones that do, usually do it wrong and fool themselves into addressing the wrong issues. They don’t really probe to find the important lessons learned — both the lessons they should try to repeat next time and the ones that they should avoid. How useful are lessons learned activities? It depends upon how you conduct them. There *are* ways to make sure you capture those important lessons to make the next proposal better.

The following is a multiple choice quiz. Which of the following approaches to lessons learned do you believe will be the most valuable in improving your future proposals?

Scenario #1: Immediately after proposal submission, before the team members disband and go back to their “real jobs,” the proposal manager calls a meeting to discuss “lessons learned so we can do it better next time!” Or the proposal manager asks everyone who was involved in the proposal to write down his or her thoughts on how to improve the next proposal.

Scenario #2: Oh damn! Lost again! Let’s send the program manager and proposal manager to get a debriefing, find out why we lost, and have them come home and tell us.

Scenario #3: Hurray! We WON! What’s to know? We don’t need no stinking debriefing!

OK, time’s up — pencils down. Which is the right answer? *WRONG!* The correct answer is:

Scenario #4: Task your proposal organization with improving the quality of your proposals. Win or lose, someone with long-term proposal interests — and NOT directly involved with the subject proposal — should hold a candid, off-the-record meeting with your customer’s acquisition representatives. This meeting is to find out EXACTLY why your proposal and/or program 1) failed to win the contract award, or 2) actually helped you to win the contract. These debriefings should go into confidential company records and should be used to educate every subsequent proposal team.

Why don’t the first three approaches work?

Having written and managed proposals for over 30 years, I have participated in many lessons learned exercises. I have also received candid official and unofficial feedback from several Government source selection team participants. These experiences have taught me two things:

- 1) ***Just because a proposal won does not mean that it was a great proposal,*** and just because it lost doesn’t mean it was a bad proposal.
- 2) ***Internal lessons learned usually had no correlation whatsoever with the real reasons for winning or losing!***

There are lots of reasons for winning and losing beyond the quality of the proposal document. Companies with good programs presented in mediocre proposals *can* win, especially if they have a better price, have better past performance, or are perceived as best value. Winning once — or even several times — with a mediocre proposal does not mean that your mediocre proposal will win the next time. The objective must be to make each proposal as good as it can

be so that it will actually *help* you win, so let's look at each lesson-learned scenario in turn and see what is really happening.

In the first scenario, the proposal team members are on the inside looking out. They have no idea of how their proposal was perceived and evaluated by the customer. All they can observe is the company proposal process *as implemented on that particular proposal*, possibly as compared to other proposals on which they have worked. Is this approach a waste of time? Not at all; it is quite useful to improve the proposal *process*, but only if process deficiencies are corrected by company management. This “inside-out” perspective is useless, however, in improving the proposals themselves. Why? Because you have no way of knowing, just from this approach, which proposal characteristics were winners, which were losers, and which were immaterial. You cannot distinguish proposal characteristics that raised your score from those that either did not matter or that had to be overcome by other factors, such as a low price. Ignorance of these factors means you cannot use them to create a better proposal next time.

Now let's look at the second scenario. The individuals responsible for the loss are sent to find out why they screwed up, and are tasked with coming back and telling their boss. What's wrong with this picture? Let's assume they get a candid, truthful debriefing from a customer representative who is not afraid of a protest or personal lawsuit (and who is permitted by his or her boss to be candid and truthful). Imagine the proposal or program manager coming back and telling the company president, “Boy! I sure screwed up on that one! I had no idea what the customer really wanted since I had not talked to him before the RFP came out. I ignored the customer's major concerns and arrogantly proposed what I thought he needed instead of what the RFP asked for. I completely overlooked the risk aspects and failed to adequately identify the right people for the tasks. Finally, our team members argued with each other and with the customer during the orals and showed lack of understanding, cooperation, and team coordination.” I think not!

What generally happens here is that the losing program manager tells his or her boss: “They really liked our proposal! Said we had done a lot of good work and had some really good ideas. But, let's face it! This RFP was wired for GiantCorp from the start. We didn't really have a chance. And the Government program manager's brother-in-law works at GiantCorp, and ...”

In this scenario, you cannot get a true, candid assessment by sending the guilty to assess their own failures to their boss! You'll never know the real reasons for losing, so how can you possibly use this information to improve your next proposal?

How about the third scenario? “We won! We must have done everything right! Not to worry.” Ha! One of the few times that you can be assured of a completely candid, truthful, and open debriefing is when you've won. Winning contractors don't protest or file personal lawsuits. When you've won is the *best* time to find out which elements of your proposal contributed to your win and which elements you won in spite of. (Trust me on this one; there will be some of these in just about every winning proposal.) But even then, you will probably not get meaningful comments regarding personalities or other sensitive issues. A little of the Scenario #2 situation will creep into the debriefing to your boss. You will never learn the subtle lessons — the things in your proposal that you won *in spite of!*

And the correct answer is — Scenario #4. A knowledgeable but “disinterested” individual — let's call him or her the Proposals Quality Assurance Manager (PQAM) — should establish a cordial, trusting rapport with all of your potential customers, with whom both parties are at ease with candid questions, critiques, and observations, long before RFPs are released or proposals submitted. Your customer contacts must be convinced that the sole purpose of talking with the PQAM is solely to improve the quality of your proposals to them, and not to cause em-

barrassment or to obtain grounds for protest. You must continuously work at this relationship, and the individual assigned this task must have the personal qualities that inspire complete confidence and trust. Where do you find such a person? It may be from your Quality Assurance, Business Development, Contracts, or Proposal Administration organizations. It might even be a retired Chief Executive, President, Vice President of Engineering, or a consultant. The objective is to find someone who will inspire trust and confidence in your customer and in yourself, and who is objective, knowledgeable, and sensitive relative to the technical, management, logistic, political, and business issues associated with each specific proposal.

During these candid conversations with your customer, it's a good idea to send only one person in order to preclude the possibilities for confrontation, argument, or any other negative reaction. The purpose is understanding and the attitude is humility. Your representative should offer no arguments, no excuses, no explanations. "Oh, you liked that. Good, thank you. So that offended you. I see. Would you please clarify that? We will take care of that on our next proposal. Thank you for your comment." Why is having one humble person at the meeting important? Because the objective here is to avoid placing your contact(s) in a potentially embarrassing, threatening, adversarial situation. You want him/her/them to be completely at ease and free to express their ideas without having to defend them — requests for clarification are OK. Having only one of your people there eliminates a witness, so your contact(s) can later deny having said something that might get them in trouble. Utilization of an impartial reporter, who is not likely to argue with your contact, defend the proposal, or waste time trying to explain why something was done a certain way, will also stimulate an objective report.

So the best approach is actually a combination of #1 and #4. A proposal team self assessment to improve process and an independent assessment to improve results. Basically, such a lessons learned assessment will probably emphasize the need to *follow the RFP organization, answer the questions fully and concisely, avoid superfluous words, and clearly explain how your offering satisfies your customer's needs better, cheaper, and with less risk than your competitors.*

Does it work? The following is a real letter from a satisfied customer about a proposal that benefited from years of collecting and applying good lessons learned.

"This proposal has been a joy to work with; all the required information is presented in a clear easy to follow manner so that we had very few questions technically or on price or terms. This is one of the most professional presentations I have seen in a long time. It is really appreciated when a Contractor takes the trouble to present his proposal in the Government's preferred format."

*Buyer Letter of Commendation, ASD/PMRSA,
R&D Procurement Directorate,
Wright-Patterson AFB*