

# The Ultimate Guide to Proposal Management and Interviews

Confidently manage how your team responds to RFPs and conducts interviews to win more projects





# What's Inside?

## 3 Introduction

## 4 The RFP Process

- 5 Read the RFP
- 5 Distribute the RFP
- 5 To Pursue or Not to Pursue?
- 6 The Kickoff Meeting

## 8 Writing the Proposal - Who Does What?

- 13 Proposal Review
- 13 Proposal Submission
- 14 Clarifications from the Client

## 15 Shortlisted for an Interview - You're Not Done Yet!

- 15 Provide Details to Proposed Project Team
- 15 Interview Strategy Meeting
- 16 Interview Preparation
- 17 Interview Rehearsal
- 17 Debrief

## 18 Summary



## Introduction

So you want to win more business and better manage your proposals? You're not the first and certainly won't be the last. Successfully managing your organization's process for managing request for proposal (RFP) responses is a critical driver for business in construction and many other industries.

Before we jump too far into the process of managing proposals, let's look at the basics of an RFP. Simply put, an RFP outlines the requirements for a project. An RFP can range from a two or three page document with minimal requirements to thousands of pages and extensive contractual requirements. Private sector proposals tend to be less onerous, while working for the government will often yield massive RFPs.

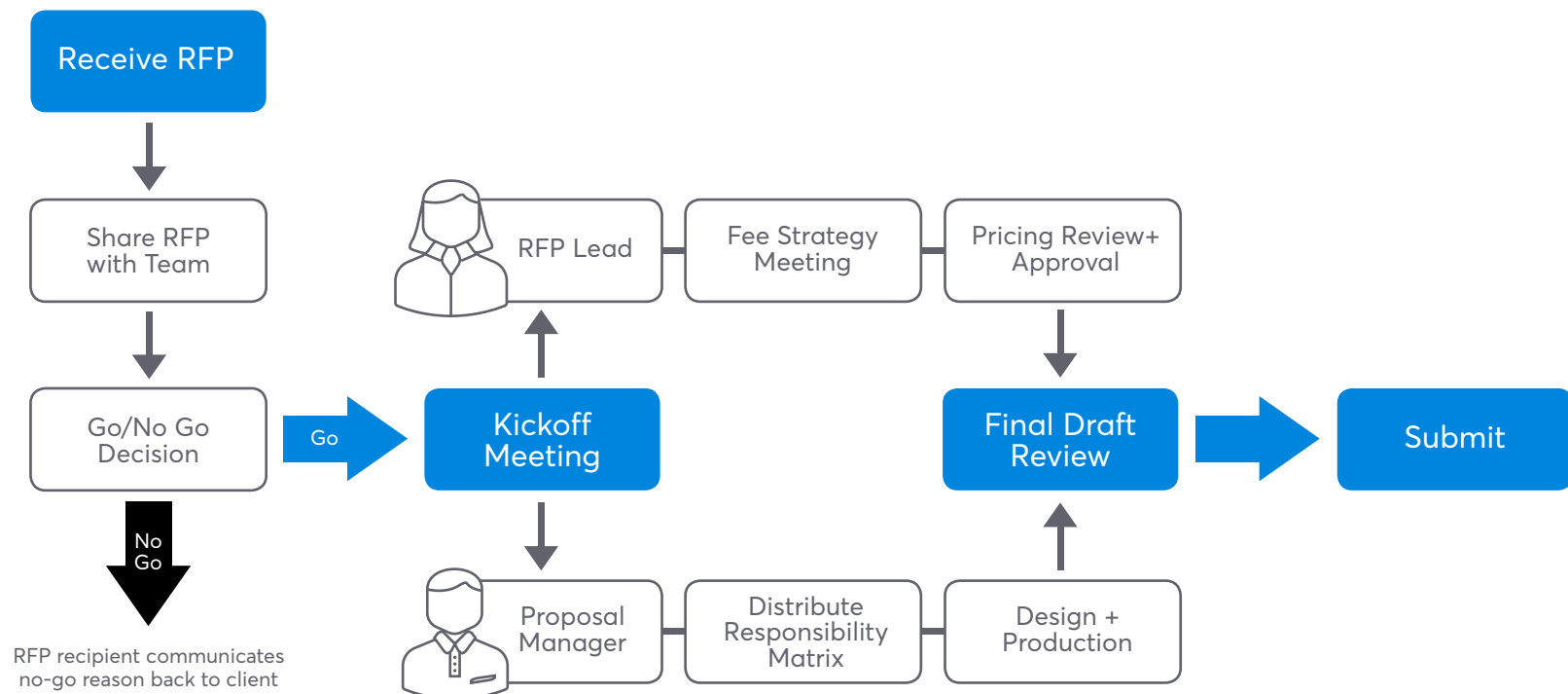
In smaller organizations, RFP responses or proposals are typically managed ad-hoc as they may appear infrequently. As they grow, organizations often employ a proposal manager to fully handle the process. Think of a proposal manager as a very focused project manager. They own the proposal process from start to finish, ensuring the response is accurate and delivered on time to the client. Proposal managers have a hectic job, often juggling multiple proposals that are all due to different clients. Large organizations may employ an entire team of proposal managers and writers to handle the volume of RFPs they receive. This guide will walk you through setting up a repeatable and successful proposal process.



## The RFP Process

The RFP process has many steps that occur from RFP receipt to final proposal submission. They include fully understanding the RFP, deciding if you will pursue the project, kickoff and strategization meetings, pricing discussions, content generation, data gathering, formal proposal review and

finally—submission to the client. If this all goes well, your team may be shortlisted with other contractors and asked to participate in a formal interview. The interview process also has many moving parts that include strategy meetings, interview preparation, mock rehearsals and debriefs.



### Read the RFP

The first step is to thoroughly read the RFP to understand the needs of your future client. Many members on your team may try to skim during this step, missing contractual requirements and providing detail to the client in their proposal that was not asked for. This often means the final proposal submitted is not compliant to the specifications in the RFP, which may cause disqualification during the evaluation process.

### Distribute the RFP

Ensure you've distributed the RFP to all your team members who should be part of the decision making process to pursue the project. Make sure everyone reads the RFP. A thorough understanding of the project requirements is critical in making informed and strategic decisions about the pursuit.

### To Pursue or Not to Pursue?

It's important to quickly decide if your organization wants to pursue the project. Clients want to understand early on who is going to respond and your internal teams need as much time as possible to properly generate a response to the RFP. Larger teams typically hold what is called a 'go/no-go' meeting on a weekly basis where the decision makers of the organization walk through all of the RFPs they have received, deciding if they will pursue them or not. Sometimes it's important to accelerate this conversation if a client gives a short window for response and there isn't a go/no-go meeting scheduled for the immediate future.

**Note:** The 'go/no-go' meeting is sometimes jokingly referred to as the 'go go go' meeting. Don't fall into the trap of pursuing every proposal that comes your way. It dilutes your resources and if the volume is too high, will cause the quality of your proposals to slip. Be strategic and selective and only pursue proposals that your company is qualified to undertake.

The leadership team should share the decision about pursuing the project with both the client and your proposal team as soon as possible. If you choose not to pursue the project, provide the reason to the client. During the go/no-go meeting, determine who will be your RFP lead (typically the Project Executive responsible for delivering the project should you win it) and also decide which proposal manager will be responsible for the pursuit.

**Tip:** Teams often receive multiple RFPs from a client each year. Strategically, it may be unwise to decline multiple projects in a row from a client, as they may stop including you in the list of possible contractors to work on their projects.

Assuming it's a 'go,' your proposal team will want to know immediately. Turnaround time for a proposal can be as slim as one or two weeks, so every business day is critical in providing the best response possible. Once notified, the proposal manager will then schedule the kickoff meeting for the pursuit.





### The Kickoff Meeting

The kickoff meeting should ideally occur within 24 to 48 hours of receiving the go decision and include the RFP lead plus anyone in the organization that will be part of strategizing how to win the pursuit. Everyone participating should have read the RFP prior to the meeting.

#### Overview

The meeting should begin with the RFP lead giving an overview of the project. This overview should include details about what's included in the RFP and any additional information the lead has from working with the client on previous projects. Sometimes RFP leads may have information about a project that is not included in the RFP, so it's important for the team to evaluate all of this detail to best determine strategy.

#### Win Themes

During the kickoff meeting it's important to determine the best win themes to increase your chances of winning the pursuit. Win themes are the concepts that can clearly differentiate you from your competitors. It's important to know who you're competing against (if this information is available) so you can evaluate how other teams may choose to respond to the RFP. Some clients will share the list of contractors that the RFP was provided to, so ask the question if given the opportunity. Wrap your win themes into the narrative throughout your proposal for the best results.



## The Ultimate Guide to Proposal Management and Interviews

### The Project Team

It's important to choose the project team during this meeting if your kickoff team has the authority to do so. Proposals for construction projects typically include resumes, which take a lot of time to prepare. If another group chooses your project teams, ensure the proposal manager has them decide as soon as possible.

### Assign Responsibilities and Deadlines

Once you've got your win themes down and a project team in place, it's time to assign responsibilities for the proposal. The proposal manager will run through each key deliverable in the RFP and the group will decide who will be responsible. Clear expectations should be set on turnaround times for each piece of the proposal.

### Questions

Before the meeting ends, it's important to see if anyone present has questions for the client. Most RFPs will have a specified date to submit questions by and the client may choose not to answer any received after the cutoff. Questions should include clarifications about the submission process, ambiguity in the formatting of the proposal, details of the project specifications or anything else that is not clear in the RFP. Be sure to identify any inconsistencies or typos and include them in your questions. Occasionally the client makes a mistake or a typo from copying old content into a new RFP, so it's important to get clarity.

The proposal manager should gather and submit all of the questions, unless the RFP lead has an established relationship with the customer. If that relationship exists, the RFP lead should submit the questions the proposal manager has compiled. Be strategic when asking questions. Typically, everyone responding to the RFP will see the questions submitted by the other contractors. Often times, other contractors can see who asked each question. Asking certain questions of the client may show other contractors your strategy for winning the project. Other times, asking certain questions can force the other contractors into responding to a portion of the RFP in a more defined way, leveling the playing field across all respondents for the project approach and pricing.

After the kickoff meeting is over, the proposal manager will send out a responsibility matrix that outlines the key parts of the proposal, who is responsible and includes the respective due dates.



## Writing the Proposal - Who Does What?

Responsibilities for the proposal will fall under the proposal manager and the RFP lead, with specific scope items assigned to other parts of the team based on their experience and knowledge. The proposal manager often has other resources that report to them such as proposal writers and marketing coordinators. They will help with finding useful content from previous proposals or handle tracking down other company data requested in the RFP. There are also typically design resources available on the marketing team that will generate the polished final deliverables.

### The RFP Lead

After the kickoff meeting is complete and the responsibility matrix has been shared with the team, the RFP lead should begin coordinating the cost portion of the proposal with the estimating team. They should schedule a cost and fee strategy meeting with the estimators assigned to the project. Final approval of cost and fees should be given 24 to 48 hours before the proposal is to be submitted to the client. These details should be provided to the proposal manager as soon as they are ready.



**Note:** In construction proposals, pricing often comes in very late. Subcontractors are often providing the price for their scope of work to multiple general contractors and strategically don't want to share it until just before the submission time. This creates challenges for the proposal team and impacts the proposal submission. Try to get your RFP lead and estimators to gather all of their cost data as early as possible, although sometimes this falls outside of their control. Frequent check-ins make this less stressful for the team.





## The Ultimate Guide to Proposal Management and Interviews

### The Proposal Manager

The first thing the Proposal Manager must do is complete the responsibility matrix and distribute it to the team. The matrix should include the project name, a description of the project, the delivery method, the square footage of the project, the location and the start date. It should also include a detailed breakdown of the required proposal content with a description of each section, the assigned author and an internal due date for the content. This often will include:

- Cover letter
- Executive summary
- Resumes
- Project descriptions
- Technical narrative
- Schedule and schedule narrative
- Organizational chart
- Financial details
- Safety narrative and safety record details

The proposal manager and marketing team won't necessarily write every portion of content listed above. At a minimum they will generate drafts of the cover letter, executive summary, resumes and resume bios, project descriptions and the organizational chart.

They will also locate proposal content from prior submissions that may be useful for helping others write their sections. Having a 'go-by' helps experienced and junior team members alike in writing their sections.

### Let's Start Writing

So as a proposal manager, you've got a lot to write as indicated above. The best way to get started is to be organized. Always reference the responsibility matrix you've generated to make sure you're meeting all the requirements of the RFP.

Before you start writing, make sure that you've pulled any appropriate existing content from proposals that already have been written. Many RFPs will request the same details or information, so if it is correct and compelling then it should be OK to use. A good rule of thumb is to use content from **winning proposals**, but sometimes content used in a proposal that did not win is still OK as a starting point. Use your best judgment on what is good to reuse and what is not.

### The Cover Letter

The cover letter is the first thing your client is going to read when reviewing your proposal, so it's important to get it right. Many RFPs will not specifically request a cover letter, but it's a good choice to include one unless there's a page count in the RFP requirements that you may be exceeding.

### The Executive Summary

This is another section of your proposal that may not have been requested in the RFP, but should be included if allowable within the RFP requirements. The executive summary should clearly summarize points that align with your win themes and differentiators from the competition. If you can provide something that your competitors cannot, this may be a good opportunity to introduce that concept.

Win themes and differentiators can include a project team that have previously worked on that project site or for that client, having existing contracts with the owner, a project team with experience that closely align with the project scope and your team's utilization of construction productivity software or other technology in the field.



## The Ultimate Guide to Proposal Management and Interviews

### Resumes

Most RFPs in the construction industry ask for resumes of the team being proposed for the project. This is a critical part of the proposal. Ensure your proposed team meet the requirements for type of experience and years on the job. Proposing a project team that doesn't fit the requirements is a fast way to get disqualified. Additionally, be sure to understand your clients expectations surrounding the team you provide. Some contractors will propose their best team members with the expectation that they will be switched out for others by the time the project is actually awarded. Many clients will penalize you financially for doing this, so read the RFP closely.

Include professional photos of each team member proposed and a brief biography of their experience tailored to align with the project requirements. Select previous projects they've worked on to include those that are appropriate in scope for the RFP. If you have employees with existing

positive relationships or experience working with the client, consider using them on the team. Resumes should always be strategically customized for each proposal they are included in, as it increases your chances of winning the project.

If the RFP does not list specific positions to include in the proposal, at a minimum you should provide the project executive, project manager, preconstruction manager, superintendent and project engineer. Also consider principal-in-charge (if the project is large enough), safety professionals, general superintendents, VDC managers and preconstruction executives.

**Tip:** It is good practice to have prepared resumes for your entire team prior to receiving an RFP. This allows you to focus on tailoring them to fit the response instead of scrambling to get the content in place by the due date. Resumes are very time consuming to produce accurately.



## The Ultimate Guide to Proposal Management and Interviews

### Project Descriptions

Most clients will want to see descriptions of your prior work as a firm. This is your opportunity to shine, so put some serious effort into these. Make sure your projects meet RFP requirements including the completion date, project size and location. Include a detailed narrative about the project and a summary of what went well for the client. If there were any positive learning experiences that would apply to the project in the RFP, include those as well.

High quality photos are also important to feature with the project description. It's worth having professional photos taken of your projects during and after completion. If you have lots of quality photos from your projects, you might choose some to

include in different sections of the proposal. If you do this, be sure to include captions detailing what it is and that it is your own project. You can also feature aspects of your work beyond the requested number of projects if you weave photos into other parts of the proposal where applicable.

Some RFPs will restrict the number of projects you can include, but even if they don't it's good to be mindful of the volume you roll into the proposal. Excessively long proposals can frustrate your client and they may stop reviewing it as a result.

### Technical Narrative

The technical narrative should be written by the project executive being proposed on the project. Since they are the one that will actually execute the work, it's critical to get their input on how the job should be done. Provide as much detail as you are able in this section, as it's where you will weave many of your differentiators into the proposal—especially if you have creative ways to accelerate the schedule or save costs.

Be sure to have the proposal manager review this and ask questions where applicable. While this section should be technical and detailed in nature, it should be understandable to someone without a construction background since the person reviewing the proposal may not be from the industry. This concept should be applied to all other sections of your proposal.





## The Ultimate Guide to Proposal Management and Interviews

### Safety Narrative and Safety Record

If your company is large enough to employ a director to oversee the safety team, they should be responsible for writing the safety narrative. Make sure to indicate any safety professionals you will have onsite, security measures for the project and laydown areas and any tools that your team uses that will differentiate you from competitors. Things like software tools and other technology are becoming increasingly important on the project site, so consider some of them when building out a project plan.

### Schedule and Schedule Narrative

If the project is large enough to have a dedicated scheduler or project controls person onsite, they should generate the schedule and write the schedule narrative. If the project is not large enough for that, then it will be the responsibility of the proposed project executive. The schedule should meet any requirements in level of detail and file type outlined in the RFP. Many RFPs may not ask for a schedule narrative, but it's important to include to help all your reviewers understand what you are proposing.

Another differentiator that is worth including is a map or diagram of your laydown area for the project. Showing the client where your materials will go, where shipments will arrive and how traffic will move throughout the site is important to better show your client that you fully understand the scope of the project.

### Organizational Chart

The proposal manager should be responsible for generating a sketch of the organizational chart and providing it to the graphic design team. The project executive may wish to weigh in on the structure, depending on the scale of the project. Consider featuring joint ventures and key subcontractors, if applicable.

### Financial Details

Financial details can be sensitive in nature. If permitted by the RFP, these should be included separately in a sealed envelope or emailed directly from your accounting team to the client. Make sure to provide all the details the client requests, as non-compliance can lead to disqualification or client concern over your financial stability.

## Proposal Review

Many proposal submissions run down to the last minute before the due date, creating a stressful moment with opportunities to make mistakes. If your proposal process is managed well, there should be plenty of time to review the complete written draft before submission. This review should include at minimum the proposal manager, project executive and principal-in-charge. This review should occur at least 48 hours before the submission time and date to allow for enough time to make any necessary changes.



### Proposal Submission

Proposals are either submitted electronically via email, through a web portal specific to RFP responses or via printed hard copy. It is important to note that many clients take due dates and times very seriously. Even being one minute late on a submission may be grounds for disqualification.

#### Electronic Submission

Electronic submissions should ideally be made 24 hours prior to the due date and time. This is important because problems can come up during submission and you will need time to determine the cause. One example is that email servers can lag, so even if you pushed send before the cutoff submission time it may not arrive at the destination until after the deadline has passed.

If your submission is through a dedicated website, know that web portal submissions can be complicated to navigate. They require each section to be submitted in the exact format requested, so sometimes when pushing the submit button you may receive an error. Not allowing enough time to troubleshoot these problems may lead to missing the deadline. Most online portals turn off entirely once the due date and time have passed, so there is no margin for error.

////////////////////////////////////

**Tip:** Occasionally a web portal may be poorly designed so that unexpected additional details are requested on a secondary page. This request page may not appear until you've pressed next or submit. This can be a stressful surprise to get and by not allowing enough time to respond—those unexpected queries may cause you to miss the deadline or provide insufficient detail to the client.

#### Hard Copy Submission

If the RFP requires a hard copy submission, this should be built into the proposal review schedule. Some customers require numerous copies (e.g., 10+) to be submitted and this will require additional time for production, especially if your company doesn't do this on a regular basis. The firm due date and time still applies to hard copy submission. If you are using a courier, this should be shipped with a scheduled and guaranteed delivery time that is included in the cost.

Track the delivery to verify it was received by the client. It's also wise to consider having a backup plan should the initial delivery get lost or fail to arrive in time. This can either be an expedited delivery from another courier or a hand delivery by someone on your team. Ensure that the person delivering the package understands the importance of being on time. The one minute late disqualification mentioned previously still applies, even if you're handing over a physical copy of the proposal.



### Clarifications from the Client

Sometimes the client may have questions about your proposal and will ask for more detail either via a formal request or casually via email. This may be your opportunity to determine what really matters to your client and propose something to better meet their needs (including a price adjustment). If possible, add some polish to your responses by providing an actual document with design flair instead of responding in text via email. This is a chance to show that you remain serious with your potential client.

**Tip:** Never count on there being a clarification request or an opportunity to revise your proposed price. Assume what is submitted in your proposal is your best offer and is contractually binding.

If you do not end up winning the project, request a debrief with the client to better understand why. Some clients will give you valuable information about what was successful about your proposal and what was not. This gives you an opportunity to present better proposals to them and other clients in the future.





## Shortlisted for an Interview - You're Not Done Yet!

Hopefully your proposal was so compelling that the client moves straight to awarding the project to you. Unfortunately, this is usually not the case. Clients will typically narrow down the potential winners of the project to three or five candidates and conduct formal interviews in their offices to better get to know the team and understand what you are proposing. Preparing for these interviews is a critical step in winning the project. An unpolished presentation may leave the client feeling like you are not really interested in working with them.

### Provide Details to Proposed Project Team

Your proposed project team needs to be present for the interview. It's likely that some of them have had little or no involvement in the preparation of the proposal, so they will need to quickly familiarize themselves with the project so they can accurately present on the win themes outlined in the proposal. Distribute your completed proposal (including cost data) to each team member along with all RFP documents received from the client. Make sure any responses to Q&A are included in the package you give to your team. Do your best to compel them to read all the materials and familiarize themselves with the project before the pending strategy meeting.



**Note:** Sometimes the interview lead will not be the proposal manager that was involved in the proposal submission. This can vary by company based on the size of the marketing organization.

### Interview Strategy Meeting

The interview strategy meeting is an important step in preparing for your pending interview. This meeting should include senior level team members, the RFP lead and the proposal manager. During the meeting you should determine the interview strategy, generate a win plan and create a rough outline for how the presentation should be structured. You should also agree upon a time for the first interview preparation meeting. All of these steps will ensure the agenda is clearly defined before the meeting.



## The Ultimate Guide to Proposal Management and Interviews

### Interview Preparation

The interview preparation meeting is where your entire team will get together for the first time to discuss the project being proposed upon. The RFP lead should start by providing as much detail about the project approach and win plan that was determined in the strategy meeting. Hopefully your team has had time to review the documents distributed when you were shortlisted, but if not—a thorough download of information should take place before getting too far into the agenda.

Once everyone is up to speed on the project, begin walking through the shell presentation created during the strategy meeting. This is where you determine what content is needed in the presentation and who is responsible for creating it. It is also important to identify which visuals will be incorporated into the presentation so the

graphics team can get started creating them. If you have a VDC manager, consider having them model features of the building to show with virtual reality tools. It's exciting for the client to get a real glimpse of their future facility and can really help generate excitement in an interview.

At the end of the meeting, make sure it is very clear who is responsible for what and then set a time for rehearsal together. The expectation should be that all team members responsible for generating content will do so by a set time prior to the rehearsal meeting. This gives the proposal manager enough time to complete and polish the presentation. Missing these deadlines greatly impacts the quality of the presentation for the rehearsal.



### Interview Rehearsal

Rehearsals are where your team starts to shine. They should have already provided all of their content to the proposal manager well in advance of the meeting and the presentation should be polished. Walk through it with the team so they can familiarize themselves with how the content has been laid out and organized. Once everyone is comfortable with the content, assign slides to team members and start the mock rehearsal. Treat this like you are really interviewing for the project and try not to break character. These rehearsals should be timed to ensure you meet the window given to you by the client.

Once the team feels confident with their parts, invite a group in to sit through presentation. Follow this with a mock question and answer session with real questions that may come up in the real interview. Before the meeting ends, the team that asked questions should provide feedback on the presentation and how the team responded to the questions.

Depending on the importance of the project and the amount of time available, you may choose to have multiple rehearsals. Once this process has wrapped up, you should be ready to conduct the interview!

### Debrief

Once the interview is over, it's important to gather as a team (including the proposal manager) to conduct a debrief while it's fresh in their minds. This helps evaluate what went well and what did not. The winner of the proposal will likely not be decided yet, but it's good to get a better sense of how it went. It can be useful for those that participated in the interview to provide feedback candidly to help each other develop their skills and prepare for the next interview. Document what went well and what did not so the opportunities for improvement are not forgotten.

Once the client decides who has won the project, it's critical to meet with them as soon as possible. If you were awarded the project, quickly assess next steps and ensure your team is meeting agreed upon deadlines outlined in the contract and schedule. If you did not win the project, politely request a debrief from the client to better understand why they made their decision in favor of another contractor. This feedback should drive future interviews with that particular client, as well as other interviews with new clients should the feedback be relevant.





## Summary

With this information you should be ready to get started winning more work for your team. It's important to stay organized and keep track of all the moving parts of the proposal in your responsibility matrix, especially with proposals that are more complicated. If you also manage the interview process, make sure everyone is meeting their deadlines for content and rehearsals or your team won't be able to properly prepare.

After reviewing your proposal and conducting the interview, project owners should have a clear sense that you fully understand the project scope and appreciate their needs. They will also see that the capabilities of your project team line up closely with the project requirements. They should also know what resources you bring to the table and what makes you firm the best option. They should be comfortable with your price, or have offered an opportunity to revise it by providing constructive input on your pricing proposal.



## See a Live Demo

or give us a call at +1 (415) 429-1227

PlanGrid's Construction Productivity Software is the easiest and most cost-effective way to get substantial return on your investment in construction mobile apps. By using PlanGrid you will:

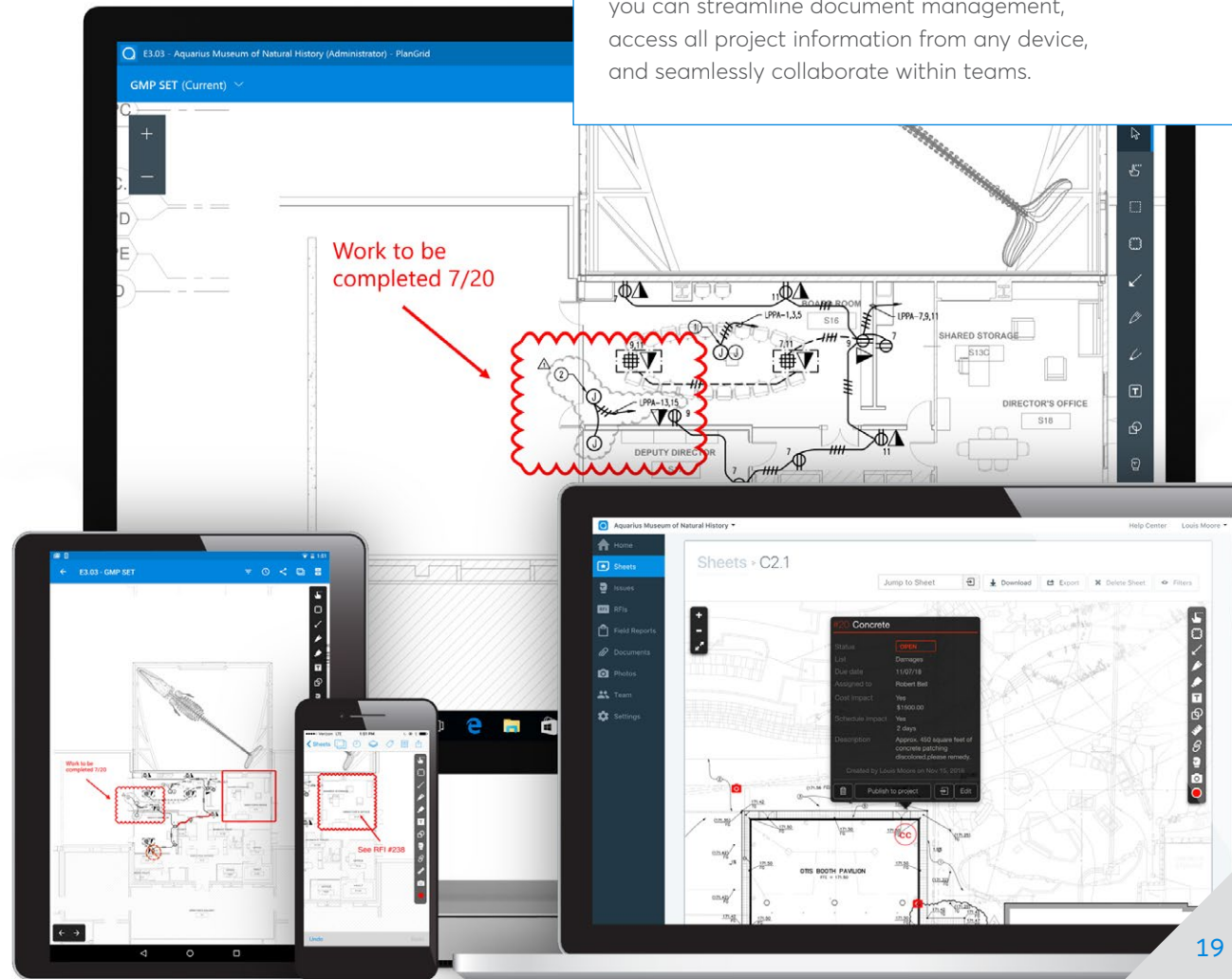
- **Complete projects faster:** 90% of project costs occur in the field and not in the office. This includes wasted time and project delays. With PlanGrid, you can reduce wasteful trips to the trailer and time delays, while eliminating costly rework. PlanGrid also allows for faster collaboration and communication.
- **Reduce costs:** PlanGrid allows you to optimize productivity in the field, which eliminates time waste that causes project overruns. By completing projects early or on time with PlanGrid, contractors will benefit from reduced costs.
- **Win more bids:** The best way to bid more competitively is not just to track costs so you can provide more accurate estimates — it's to improve your overall productivity. PlanGrid's Construction Productivity Software will allow you to increase productivity so you can reduce costs and win more bids.



Try PlanGrid for Free



There is a reason why PlanGrid is not only the #1 construction app, but also the highest rated. With PlanGrid construction productivity software, you can streamline document management, access all project information from any device, and seamlessly collaborate within teams.







Used on more than 1,000,000 projects around the world, PlanGrid is the first construction productivity software that allows contractors and owners in commercial, heavy civil, and other industries to collaborate, collect, and share project information from any desktop or mobile device through the entire project lifecycle.

PlanGrid increases project efficiency by streamlining document management, providing construction teams with easy access to all project information from any device, and enabling seamless collaboration within teams.

#### About the Author

Eric Thomas is the Content Marketing Manager at PlanGrid. Previously, he worked for Gilbane Building Co. managing proposals for U.S. government clients. He also served as Marketing Manager at Truebeck Construction and as the first Proposal Manager for Grand Rounds Inc. Over the course of his career he has been part of over \$1B in winning proposal efforts.

#### Connect with PlanGrid



© 2018 PlanGrid, Inc. All Rights Reserved.

United States  
+1 (415) 963-4088  
[www.plangrid.com](http://www.plangrid.com)

Australia  
AUS 1800 316 406  
[www.plangrid.com/au](http://www.plangrid.com/au)

United Kingdom  
+44 (0) 20 3695 0292  
[www.plangrid.com/gb](http://www.plangrid.com/gb)

Canada  
(800) 646-0796  
[www.plangrid.com/ca-en](http://www.plangrid.com/ca-en)

Hong Kong  
+852 5808 3598  
[www.plangrid.com/zh](http://www.plangrid.com/zh)  
[apac@plangrid.com](mailto:apac@plangrid.com)