

## *An Encouraging Exercise: Match Technical Communicator abilities to anticipated proposal activities*

### *Part I: A partial list of what technical communicators do...*

1. Follow directions; comply with instructions
2. Collaborate with technical experts and executive managers
3. Write convincing narratives
4. Interview scientists and engineers
5. Establish and manage complex schedules
6. Assemble and train ad hoc project teams
7. Organize peer and editorial reviews; resolve comments
8. Develop and implement project communication plans
9. Mediate, negotiate; balance disparate work styles
10. Design, prepare, revise resumes and project descriptions
11. Develop creative ways to display information in varying media
12. Showcase technical products effectively
13. Get communication projects out the door on schedule, under budget
14. Understand when to stop revising; accept "good enough"
15. Work under tight, inflexible deadlines
16. Facilitate meetings; insist on action item resolution
17. Apply generalist's knowledge and interest in many subjects
18. Resurrect and improve old text; adapt "boilerplate."
19. Keep ones cool when all about are losing theirs
20. Retain an affection for words and pictures
21. Communicate effectively and comfortably with clients
22. Manage production and distribution of high quality deliverables
23. Plan and conduct meetings and presentations
24. Retain sense of humor; appreciate irony
25. Choreograph exuberant celebrations
26. ??
27. ??
28. ??
29. ??

**Proposal Activities: *Match technical communicator skills against pertinent proposal activities***

Proposal Activity	Ability #
<p><b>Phase 1: BEFORE THE REQUEST FOR PROPOSAL IS ISSUED</b></p> <ul style="list-style-type: none"> <li>• Research potential client; market as appropriate</li> <li>• Gather general information on proposing company – resumes of employees, past experience, company history/resources. Edit/revise boilerplate</li> <li>• Research potential competition</li> <li>• Arrange for notification when RFP released – serve as point of contact and liaison to potential client</li> <li>• Identify available resources for proposal team and to be bid into proposal</li> </ul>	
<p><b>Phase 2: PROPOSAL RECEIPT AND PREPARATION FOR PROPOSAL PROCESS</b></p> <p><b>Within 36 hrs. of issuance of RFP</b></p> <ul style="list-style-type: none"> <li>• Scan entire proposal; identify unusual requirements</li> <li>• Prepare/submit list of questions for clarification</li> <li>• Draft high level outline based on proposal instructions, i.e. requirements driven outline</li> <li>• Identify potential “show-stoppers” and “discriminators”</li> <li>• Request initial corporate bid/no bid decision based on requirements, available resources to support project</li> <li>• Draft high-level schedule</li> </ul>	
<p><b>Assemble Proposal Team<sup>1</sup></b></p> <ul style="list-style-type: none"> <li>• Corporate champion (senior manager to assure cooperation)</li> <li>• SMEs to draft responses to technical questions in Statement of Work (or be interviewed if necessary)</li> <li>• Costing and corporate finance experts</li> <li>• Writer/editor(s); Desktop publisher(s); graphics specialists</li> <li>• Process and production coordinator (or interview and select dependable, out-of-house production contractor)</li> <li>• Section or “book bosses”/writers</li> </ul>	

<sup>1</sup> Depending on the size and complexity of the proposal, sometimes the proposal manager serves in most of the proposal team roles.

<ul style="list-style-type: none"> <li>• Reviewers including - Peer (blue team draft), costing strategy (green team), adversarial (red team draft – entire proposal), and editorial reviewers (all drafts of technical and management proposal; last draft of cost proposal) Note: Often the proposal team interfaces only indirectly with the contracts/financial team actually preparing the cost proposal.</li> <li>• Secure Resources for team to collaborate effectively including Internet connectivity, secure “war room” for collaboration and scripting/brainstorming</li> <li>• Prepare conformance matrix – to make sure all proposal requirements are covered</li> </ul>	
<p><b>Phase 3: PROPOSAL PREPARATION</b></p> <ul style="list-style-type: none"> <li>• Refine proposal outline</li> <li>• Hold proposal kickoff meeting. Make assignments; establish <i>firm</i> deadlines.</li> <li>• Develop draft of proposed organization, descriptions of key roles. Identify proposed staff for each position and collect profile and resume information</li> <li>• Interview SMEs; draft and/or collaboratively iterate material developed for technical proposal</li> <li>• “Tweak” resumes and relevant company project descriptions to satisfy requirements of proposal</li> <li>• Verify that all production materials are ordered; test for any challenges related to printing or electronic distribution</li> <li>• Design elements - cover, tabs, CD labels, , etc.</li> <li>• Draft executive summary (or edit if drafted by proposal manager or proposed project lead)</li> <li>• Draft cover letter</li> <li>• Review and update conformance matrix</li> <li>• Perform substantive edit</li> </ul>	
<p><b>Phase 4: REVIEW PROCESS</b></p> <ul style="list-style-type: none"> <li>• Participate in internal reviews; coordinate with Cost Proposal Team to assure consistency</li> <li>• Match proposal against evaluation criteria, proposal instructions, and requirements to assure compliance</li> <li>• Review compliance matrix; verify that all requirements met</li> <li>• Facilitate Blue Team and Red Team Reviews; coordinate comment resolution and incorporation</li> </ul>	

<p><b>Phase 5: PRODUCTION PROCESS</b></p> <ul style="list-style-type: none"><li>• Arrange for independent copy edit</li><li>• Test any copy to be submitted by internet interface, email, or CD to assure client Evaluators will be able to print as intended.</li><li>• Assemble QA team to verify completeness, accuracy, quality of proposal as submitted</li></ul>	
<p><b>Phase 6: Follow-Up</b></p> <ul style="list-style-type: none"><li>• <b>Wait patiently</b></li><li>• Facilitate/coach key personnel for Oral Presentations; prepare presentation materials</li><li>• Respond to questions; coordinate Best and Final Offer (BAFO) submittal</li><li>• Assist with PR activities for corporate visibility during decision-period</li></ul>	