

*Forget Hope:*

TAKING

STRATEGIC ACTION

FOR

PROPOSAL

SUCCESS

BANK OF AMERICA 



# KRYSTN MACOMBER

CP APMP Fellow, LEED AP

Summit Strategy Founder + CEO

- » 20+ years of experience
- » East Coast, West Coast, Midwest, International experience
- » B2G + B2B
- » Developed holistic sales process + infrastructure
- » Led marketing/pursuit teams as small as 2 + as large as 20
- » Certified proposal practitioner + APMP Fellow
- » Competitive + driven to find the winning solutions
- » APMP Global Chair | 2021



**BANK OF AMERICA  
GOVERNMENT CONTRACTING GROUP**

**CHRISTA  
WILLIAMS**

**VP; GOVERNMENT CONTRACTING  
BUSINESS INTELLIGENCE MANAGER**

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**BANK OF AMERICA** 



# WHY ARE YOU HERE?

- » 1. Struggling to win new business
- » 2. Tired of writing repetitive proposals
- » 3. Difficulty standing out from your competitors
- » 4. Lack of business development strategy

**THERE'S A BETTER (EASIER) WAY**



A

# KEYS TO A WINNING PROPOSAL

Compliant

1

Compelling

2

Clear

3

Credible

4

# KEYS TO A WINNING PROPOSAL

Compliant

1

# ALWAYS FOLLOW THE RFP

even if it makes no sense ✓



# KEYS TO A WINNING PROPOSAL

Compelling

2

**WHY**

**SHOULD THE CLIENT SELECT**

**YOU** **INSTEAD OF EVERYONE ELSE?**

# COMMON MISTAKES

Providing too  
much  
information

Clients will have a hard  
time figuring out what  
you're selling

Not describing  
value from  
client's  
perspective

Why should  
the client care?

Failing to  
identify what's  
different  
about us

You'll sound just like  
everyone else out there.



# DEFINE YOUR VALUE PROPOSITION

**I** + **F** + **B** + **P**



## ISSUE

The client's challenge or problem. AKA pain point, hot button.

## FEATURE


Tangible things and solutions you bring to solve those problems.

## BENEFIT

Why your features are important to them. AKA the so what factor.

## PROOF

Evidence your claims are true. AKA prove it or lose it.

A hiker with blonde hair, wearing a green hooded jacket and an orange backpack, is shown in profile from the chest up. She is holding a large, unfolded topographic map. The background is a vast, misty mountain range with green forested slopes and snow-capped peaks under an overcast sky.

What does  
the client  
want?

**SO WHAT?**

**HEY!**  
**THIS IS NOT ABOUT**  
**YOU.**



# SAY MY NAME, SAY MY NAME

your  
name

your  
name

your  
name



their  
name

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name



# WHERE TO PUT YOUR WORDS

“Give your readers as much information as possible as soon as possible. **To hell with suspense.**”

- Kurt Vonnegut, *8 Rules for Writing a Short Story*

In a single page, put the most compelling information in the first paragraph.

In a paragraph, put the most important idea in the first sentence.

Use callout boxes to summarize or highlight information.

# KAIROS



We are  
pleased to  
pr  
proposal....

**NO ONE CARES**



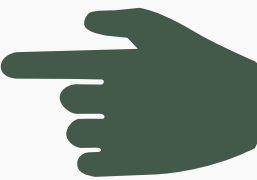


1

We are pleased to submit this proposal to the FAA. On the following pages, we have provided our technical proposal to address all RFP requirements. As the FAA's partner on this upcoming project, Summit will use our 32 years of experience to help you....

2

The FAA is tasked with a life-changing mission to .... As your strategic partner, Summit will use our 32 years of experience to help you ....



# FOCUS ON WHAT THEY WANT/NEED

Dear Mr. Doe and Members of the Selection Committee:

The National Institute of Whatever (NIW) seeks a firm who can work alongside leaders to facilitate strategic change, encourage productive risk-taking, and build credibility and trust among staff. Company Gold Star's six-year partnership with NIW has given our team an exclusive perspective on the best approach to continue serving NIW on this exciting engagement. Our proven track record will serve as a guiding framework for the executive coaching we provide to improve effectiveness, sustained health, and excel as a high performing agency. Our team provides the following benefits to the NIW:

# COVER LETTER FRAMEWORK

## 1 INTRODUCTION

Summarize client's vision, objective, and challenges  
State that we will fulfill client's needs  
Highlight why us?

## 2 BODY

Our team brings the following benefits to <client> on this project:

<Feature>: You can <improve/achieve/reduce> <benefit> by working with our team, who has the <knowledge, experience, past success> proven by <relevant experience/program> that resulted in <metric/proof>.

Repeat for 1-2 more features

## 3 CLOSING

Focus on how our mission and goals align directly with the client's  
Connect with the reader – inspire them to choose us  
Close with next steps and contact information

A person with dark curly hair, wearing a dark hoodie and dark pants, is running away from the camera on a paved path in a forest. The path is covered with fallen yellow and orange leaves. The background shows trees with green and yellow foliage. A large, semi-transparent green rectangle is overlaid on the center of the image, containing white and light green text.

**COMPELLING**

**=**

**ACTIVE VOICE**



**ACTIVE VOICE  
HELPS THE AUDIENCE  
PICTURE THE  
ACTION.**

**90%**

of a long-form document should be  
in active voice.



# ACTION VERBS



**TAKING THE LEAD** directed, executed, operated, managed, programmed

**CREATING** built, designed, developed, engineered, initiated

**EFFICIENCY** enhanced, generated, maximized, reconciled, sustained

**ACHIEVEMENT** integrated, refined, transformed, streamlined, strengthened

**RESEARCH** analyzed, assessed, calculated, explored, forecasted, modeled

**COMMUNICATION** articulated, briefed, conveyed, illustrated, reviewed, drafted

# POWER WORDS



## WORDS THAT CONVEY URGENCY

- Now
- Need
- Must
- Latest

## WORDS THAT CONVEY TRUST

- Consequently
- Results
- Secure
- Because

## WORDS THAT CREATE CONNECTION

- Join
- Help
- Discover
- Align

## WORDS THAT PROMISE A SURPRISE

- Remarkable
- Amazing
- Incredible
- Unexpected

# KEYS TO A WINNING PROPOSAL

Clear

3

Always

# TAILOR

your content



**READABILITY**

**7-8**

grade



# WRITING FOR AN 8<sup>TH</sup> GRADER



1

Remember, not all your readers will be familiar with the subject matter.



2

Use shorter words, sentences, paragraphs.



3

Use simple sentence structure.



4

Use simple words, not jargon.



5

Avoid large blocks of text, and use headings, font treatment, callout boxes, and graphics to draw attention.

# KEYS TO A WINNING PROPOSAL

Credible

4

**PROVE IT**

or lose it



# PROVE IT OR LOSE IT

Substantiate all claims with facts

Metrics are best

Don't use watered-down  
superlatives or platitudes



# PROOF EXAMPLES

Completed more than 5,000 aviation projects in the last five years.

Employ more than 50 professionals within five miles of your site.

Completed xyz similar project two months ahead of schedule.



## **BOASTING WORDS TO AVOID**

State-of-the-art

The right choice

Uniquely qualified, unique

Best of breed/class

Premier, worldclass, world-renowned

Industry standard


Leading edge, leading provider, cutting edge

# USE SUCCESS STORIES AND QUOTES


 [Redacted] has provided staff with the knowledge and experience that makes the difference in successfully serving [Redacted]'s needs. They are an integral part of the construction process, providing exceptional services that enable contractors to safely perform their work, while minimizing disruption of airport operations."

[Redacted] Shutdown Control Center Manager for [Redacted]

<b>23 GW</b>	<b>111,000 MW</b>	<b>\$150B+</b>	<b>20+</b>	<b>#3</b>
renewable projects	HVDC capacity	mega projects	years as owner's rep	ENR CA Top Design Firms

 **Successful Management Framework Leads to High Retention Rate**  
 On our engagement with [Redacted], all employees required TS/SCI due to work in Government sensitive compartmented information facilities (SCIFs) and we had many employees deployed to Outside Continental United States (OCONUS) locations. Our framework resulted in a retention rate over five years of 96%.

  
 In the past seven years, we have assisted Mississippi clients with over 107 projects valued at **\$597M**



**1,000+** wetland delineations


**300+** Phase I ESAs

**70+** Phase II ESAs

**20+** environmental assessments


**100+** stormwater pollution prevention plans


**20+** spill prevention, control, and countermeasure plans


 Our team identifies environmental and permitting factors early in the project planning phase and provides the [Redacted] and project stakeholders clear and concise project impacts to be used in the decision-making process.

**Our Team's Water Experience:**

-  **250+** W / WW Projects in the last 10 years
-  **100+** Pump Station Projects at: <1MGD TO >100MGD
-  **100+** Water and Wastewater Treatment Plants – Design and Upgrade
-  **30+** In the last 10 years
-  **50+** In the last 10 years

 **New WWTP Plant and Upgrade Projects from <1MGD to >300MGD**

 **425k** Asset condition assessments

 **Water Treatment Plant Comp**

Over a three-month period, [Redacted] sourced and mobilized over 30 staff members for [Redacted] support, including project managers, construction managers, project engineers, office engineers and administrative support. During this rapid mobilization, the team shared space and resources with the owner's staff and other consultant teams already on site for a seamless integration.

Our team completed site excavation, grading, concrete footings, foundations, slab, masonry, and stonework for the *Empire Trail Gateway and Battery Park City Authority (BPCA)*. In addition, the team fabricated and installed stone paver engraving and various kiosks



<b>30+</b> years of experience	<b>1,000+</b> wetland delineations	<b>\$597M</b> federal funding managed
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# HAVE AWESOME TEMPLATES

Solicitation No. XXXX-XXX-XX

## PROPOSAL TITLE XXXXXX

Subtitle goes here jhsdjhsdj  
kjhsdjhsjdhdjhdks sjhsjhkhdfjhfs


Month Day, 2021 | 00:00 PM

Submitted to:  
Client Name  
Secondary Client Name  
Division of Client  
Street Address  
Street Address Continued  
City, State, Zip

Submitted by:



## 1 QUALIFICATIONS AND EXPERIENCE



First Name Last Name PE, LEED AP  
Project Manager

*Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.*

**Experience**

00 years total experience

00 years with [redacted]

**Education**

MBA, Administration/  
Finance

BS, Civil Engineering

**License/Registration**

Professional Engineer  
(CA)

LEED Accredited  
Professional

**About** | Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.

**Relevant Experience**

**Project Name | Location**  
*Project Manager. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.*

**Project Name | Location**  
*Project Manager. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus.*

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[redacted]

Proposal Name | RFP No. 00000-000-00 | Page 6

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We are required to obtain, verify and record certain information that identifies the Company, which information includes the name and address of the Company and other information that will allow us to identify the Company in accordance, as applicable, with the USA Patriot Act (Title III of Pub. L. 107-56, as amended, which was signed into law October 26, 2001) and such other laws, rules and regulations as applicable within and outside the United States.

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# DEDICATED TO LEVERAGING INDUSTRY EXPERIENCE

The Bank of America Government Contracting Group represents a dedicated team of specialists whose mission is to help our clients achieve their strategic and financial objectives through the use of our intellectual and financial capital.

## Industry Leading Platform

- Bank of America is the #1 lender to the industry with over \$6 billion in loan commitments globally including **\$4 billion to small and middle market government contractors nationally**
- Relationships with **82%** of the top 100 government contractors (*Washington Technology*) and **75%** of the top 200
- Bank of America has banked Aerospace Industry for over **75** years
- One fifth of the *Washington Technology's* Fast 50 Small Businesses in the government contracting market bank with Bank of America
- Bank of America is the only financial institution that has aerospace + defense expertise coast to coast
- Bank of America has experienced industry bankers who provide complete solutions to assist companies in meeting their requirements for working capital and acquisitions, equity raising, capital deployment (dividend recaps /share repurchase), treasury management, international expansion, and employee benefits

# EXPERIENCE + EXPERTISE

- The Government Contracting group is a national practice, with a local delivery. They are deeply ingrained in the industry as a result of their active involvement with industry-related organizations, participation in industry events, and extensive relationships with agencies and intermediaries
- Bank of America's Government Contracting group is ready to support your strategic goals as you strive to grow in a changing environment. Whether via organic growth or acquisitions, domestically or internationally, Bank of America can help you achieve your goals
- Conducting business with the government creates unique financial challenges that are best understood by industry experts

## National and Regional Bank of America Government Contracting Group

### **Edward D Spenceley**

*Senior Vice President*  
National Government  
Contracting Director

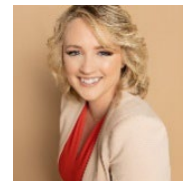


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And Regional Government  
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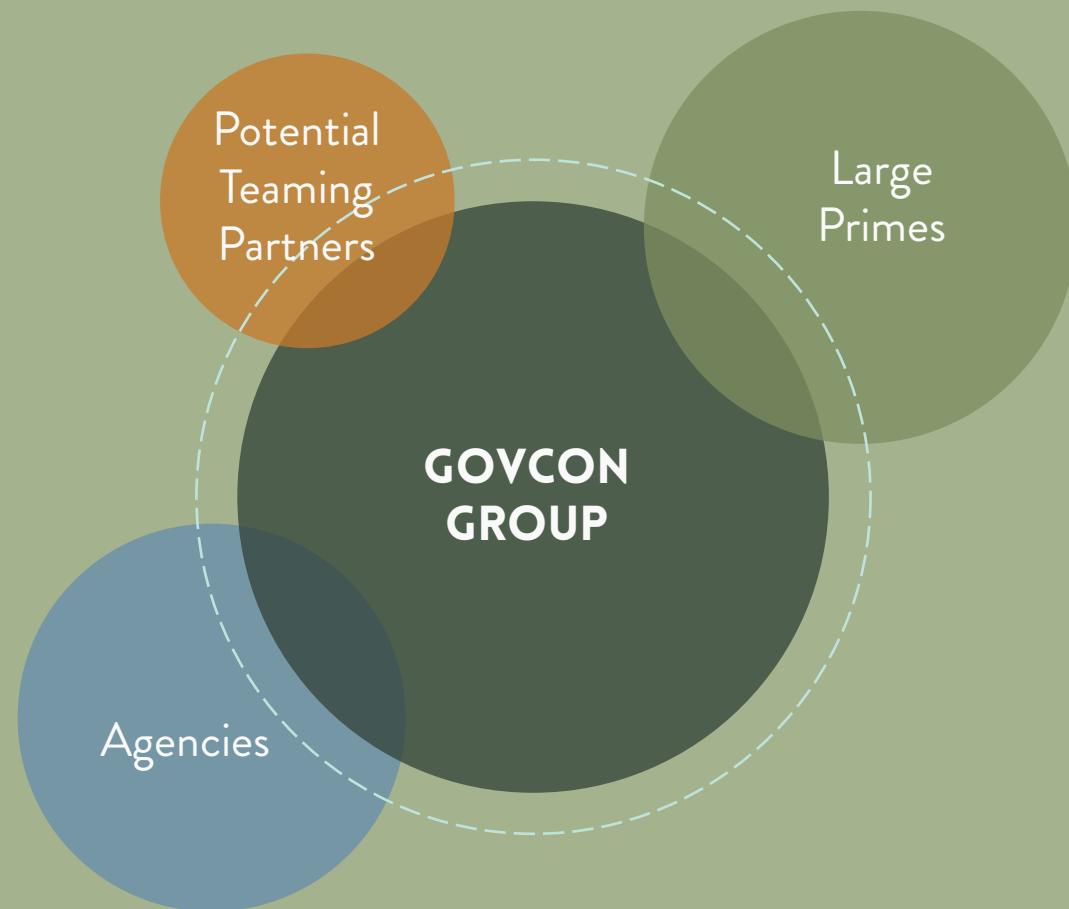


# HOW WE OPERATE

## INTERNAL CONNECTIONS

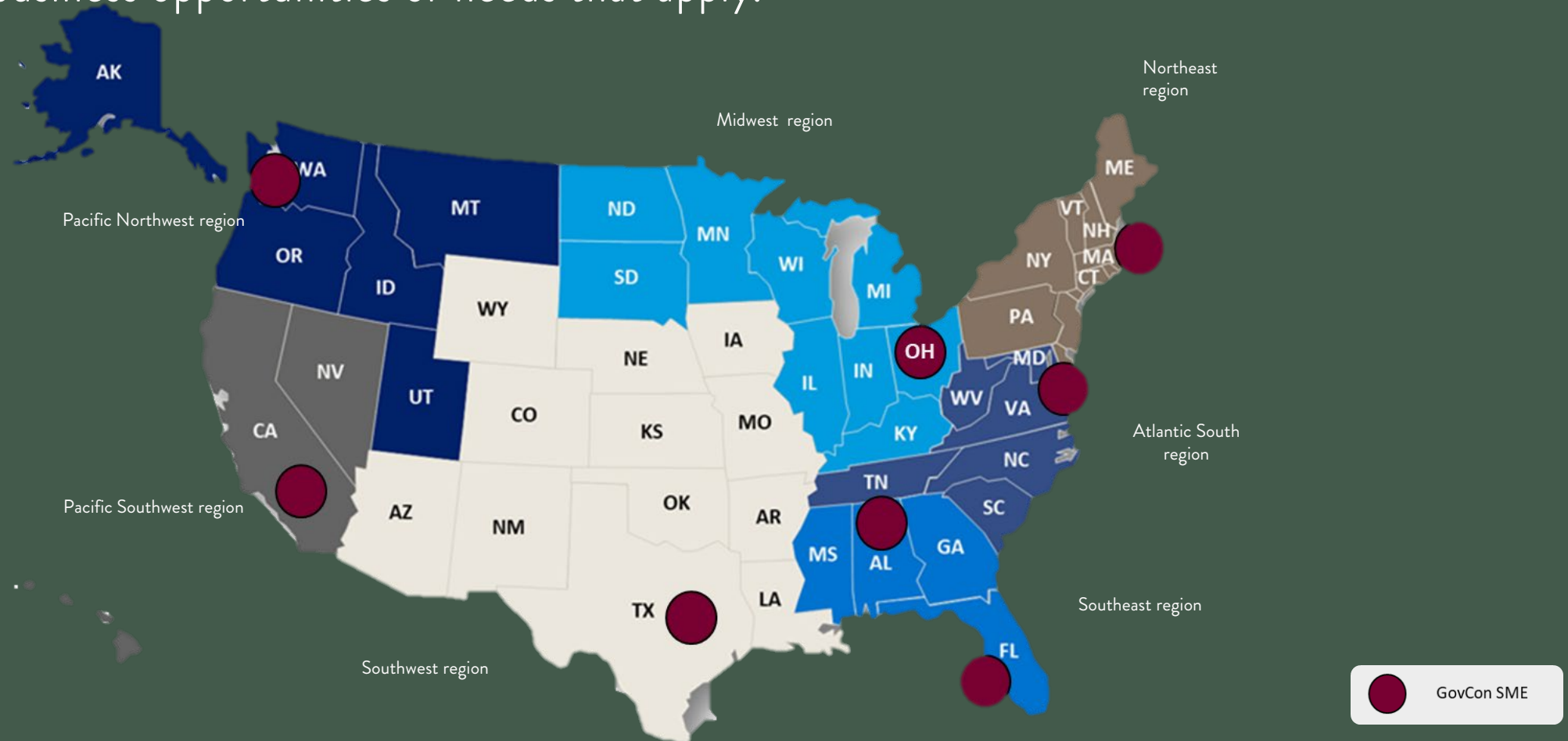


## INDUSTRY CONNECTIONS



# OUR COVERAGE MODEL

- Focusing on key concentrations of the industry across the country, we are establishing experienced support for government contractors.
- These subject matter experts (SMEs) leverage industry knowledge to advise on the various business opportunities or needs that apply.



# PROPOSAL STRATEGIES

- Know your numbers! Yesterday, today, tomorrow.
- We all have our specialties and capabilities, leverage partners when you need it. It's OK!
- Lean on your mentors and sponsors for input and lessons learned.
- Consider the broader impact on success – taxes, capital needs, equipment, etc.

# LEVERAGING THE RELATIONSHIPS OF YOUR RELATIONSHIPS

- Does your bank or capital provider understand your business and the industry you serve?
- Do they know the people you need to know that deliver to the industry?
- Engage them early and often to understand the strategy of your plan and to ensure they are working together with your other providers.
- Financial feasibility – understanding the numbers.

# CASH FLOW MANAGEMENT BASICS FOR SMALL BUSINESSES

- Forecast expenses and earnings
- Track net cash flow
- Healthy cash flow –  
positive vs. negative
- Get help from your banker

## 5 ways to improve cash flow

1. Improve inventory management
2. Collect receivables promptly
3. Manage cash wisely
4. Optimize accounts payable
5. Take steps to prevent fraud

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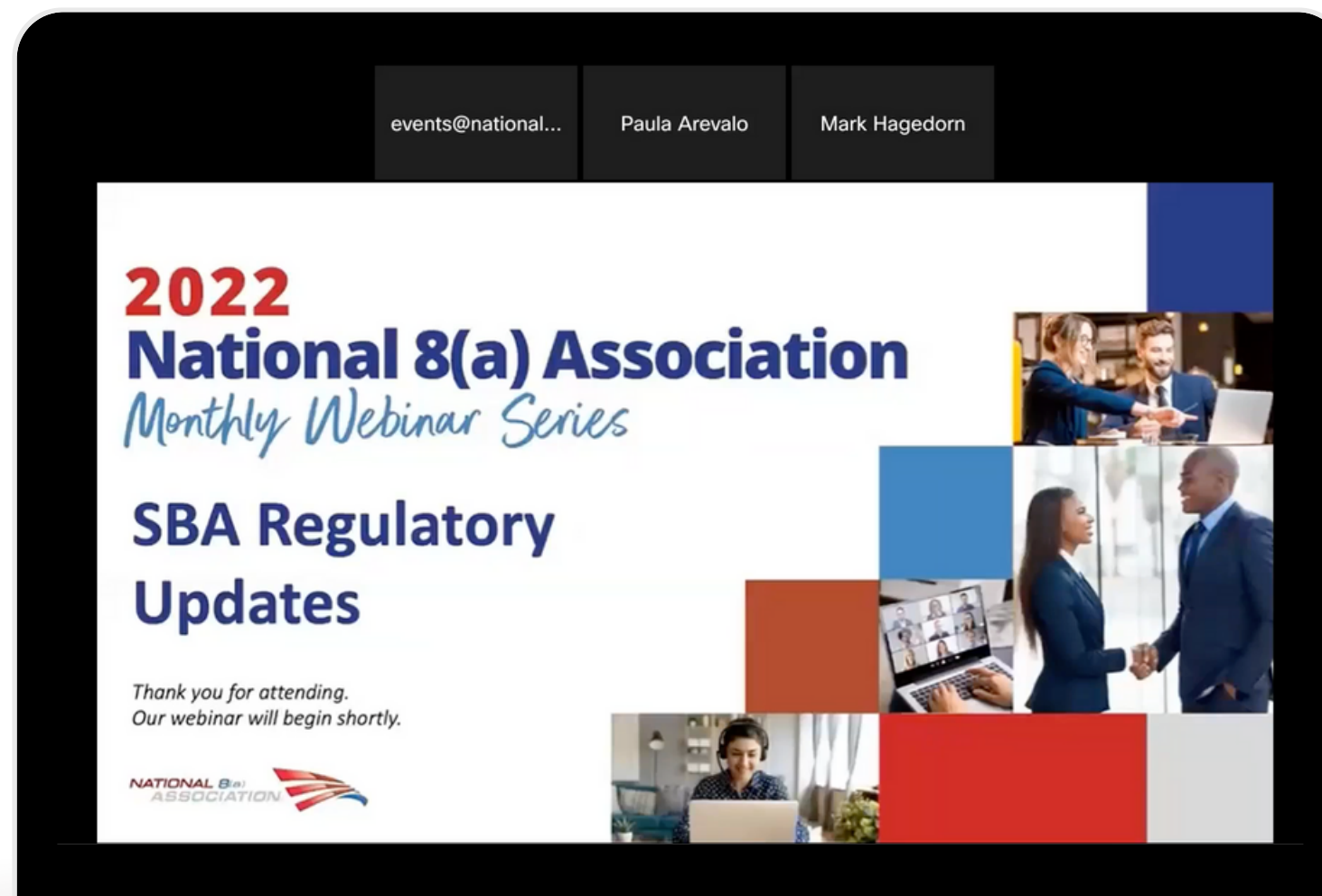


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rewatched and  
presentation materials  
can be downloaded at  
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**202-286-0557**

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**Thank you for joining us!**

