

# The Shipley 9.6 Step Process OR How to Tailor BIG Processes for Quick Turn Responses

No matter what process you begin with, it is never right for all the opportunities you pursue. Hopefully, this discussion will help you address adapting your own process without damage to the good that it does for your organization.

Lots of folks tell us that they use a “modified Shipley process” and so we’re sure there are lots of variations out there. We’ll try to address what we hope are the common factors among the variations

When you begin to look at the 96 step process in detail, there are some common responses, mostly of the “Are you kidding me?” variety.

■ *Why, then, ARE there 96 steps?*

It’s actually pretty simple. We did it to make sure that you don’t forget to do something really important. Figure1 is a snapshot that lets you see the entire thing.

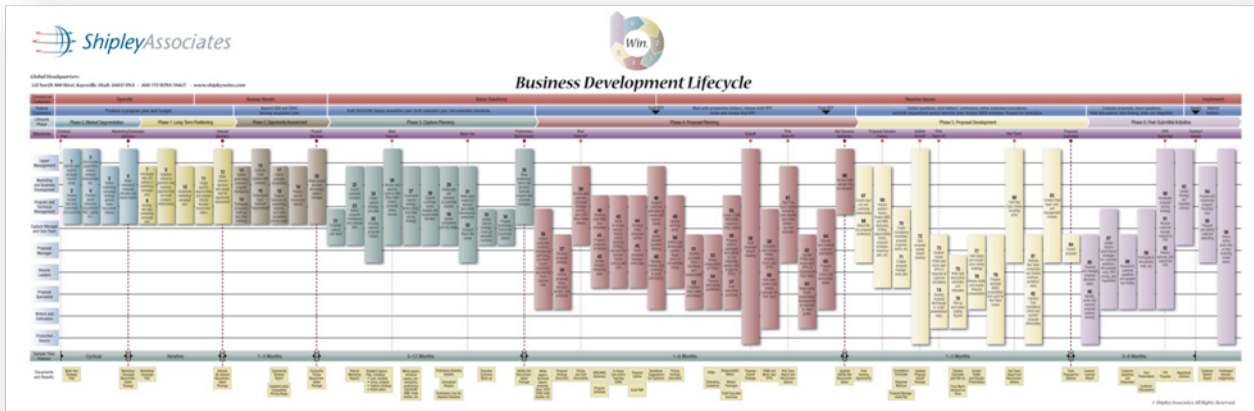


Figure 1. The Shipley 96-Step Business Development Process. Seven phases span the entire business development lifecycle. Each phase ends in a customer-triggered decision gate to continue to invest or stop the pursuit.

If you're a Federal contractor with an ID/IQ vehicle, there's NO WAY you can, or should, go through 96 steps to respond to a Task Order Request. If you're a B2B organization, half the machinations that Federal bidders have to go through are not even relevant. SO, it's just a question of deciding what is and is not important in the time frame allotted for your opportunity. To begin to figure out how to tailor this process or yours, follow the logic:

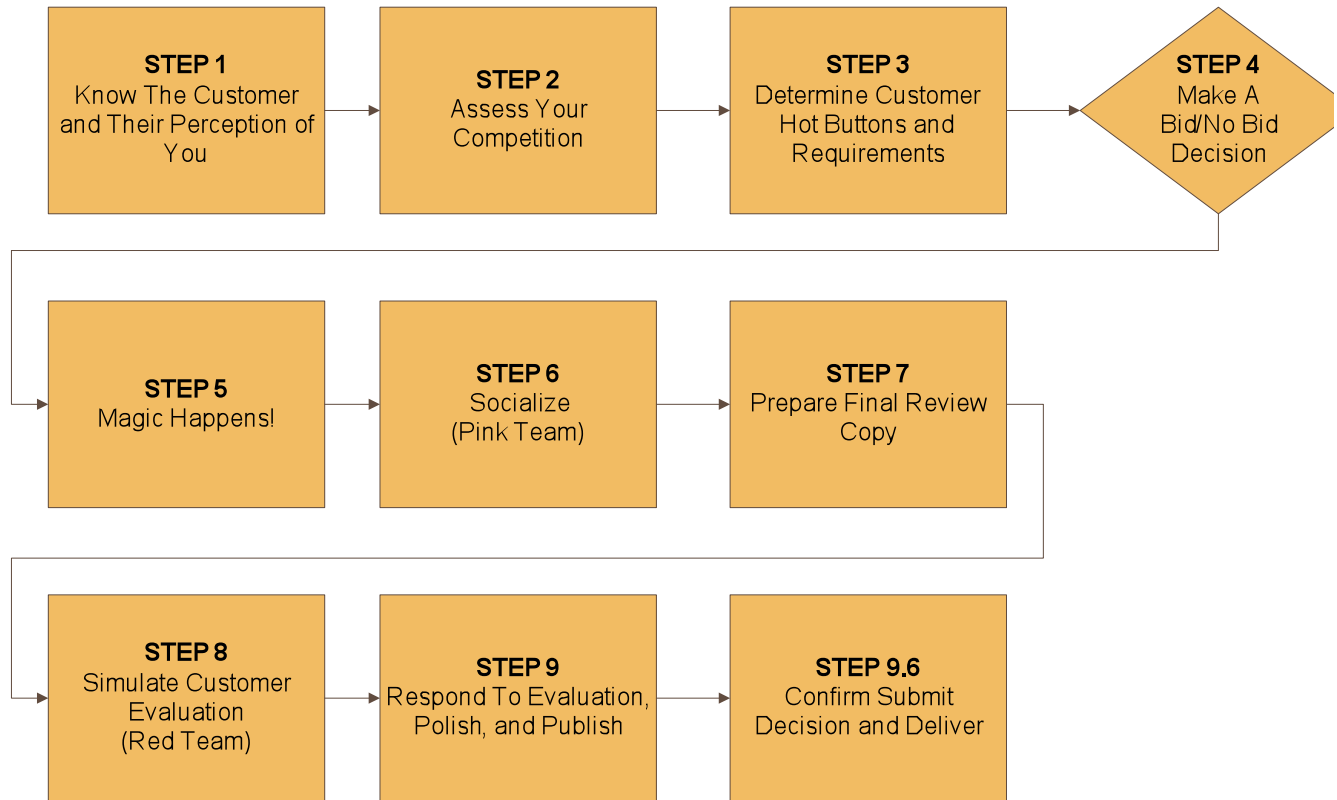
- Look at the 96 steps to see how many "plans" are created
- Notice how all of the key decisions are triggered by customer actions.
- Check the repetition of customer, competitor and company analyses that occur.
- Note the Color Team reviews and their relation to "plans".

While heroes operate alone for the benefit of the group ... good process requires the group to work as a unit. Scale and inclusion of activities, reviews, decisions and deliverables create the flexibility needed to properly tailor. Further, "Procedural dogma" is overcome by inclusion of tailorable tools that support activities. A Pink Team, for example, can be a conversation regarding your solution with the guy in the next cubicle. If your deal is worth \$25K, you can't expect to be handing out charge numbers! Intense focus on customer perceptions creates linkage from the desired benefits of customer requirements back to bidder solution and features and should be uppermost in your mind at all times.

Finally, remove only what you must and nothing more!

*Tailoring your process is NOT an excuse to remove activities you don't want to do!*

Figure 2 provides “a” tailored solution from the 96 Step Chart. Yours may be very much like this or not, depending upon your starting point. For example, if you are responding to a Task Order against an existing ID/IQ vehicle, steps 1 and 2 are already completed.



*Figure 2. A Tailored Process for Quick Turn Proposals. Retaining these steps assures that the intent of the larger process is met*

Any step that is reiterated as many times as “Know Your Customer” and starting as early in the process as it does, must be important! First among equals is to know your customer. Improving your customer’s perception of you is another way to say win strategy, although it is not the definitive win strategy unless it also discriminates your offer. We’ll get to that in the subsequent steps.

*All right, now we have a rational starting point for a compressed process.*

The next earliest and most repeated step provides you with the information you need to determine how your competitors plan to discriminate their offers. If you don’t know that, you can’t know how to discriminate your own. Second of the 3 “C’s” – Customer, Competitor, Company, this step is

the most likely to produce drinking of one's own bathwater. Try your best to involve some people with an independent perspective to complete this step. A further refinement of your win strategy will necessarily evolve from an improved understanding of the underlying drivers that keep all the decision makers awake at night. Add in the third "C", your own company's position, to inform a Bid/No Bid Decision that is in the best interest of the organization.

*Note that we're still not quite to the point in the 96 steps where the RFP is released.*

Step 4 is not really magic, but if you've been really diligent about the preceding steps, it will all come together easily and onlookers will THINK it's magic. Only you need to know how hard you've been working!

You're finally done planning and ready to begin drafting, but not without some external validation. A Pink Team by Shipley definition is not a review of a draft, but rather a review of a writing plan.

As you prepare your final review copy, some procedural elements to include are the application of templates, boilerplate, reusable graphics and plans. If your organization does not have those in place, consider them a necessity if you're in the business of short turn responses.

*When you arrive at Red Team, 2/3rds of your allocated time have elapsed.*


If your "Red Team" scores your proposal poorly, you still have some recovery time. Remember, we're scaling these events to fit your short turn response, so that "Red Team" may be only one knowledgeable person.

In Step 9, if you are a team of one, you obviously cannot fire yourself following Red Team, but if you can't see past the problems found by your review, try to get some support from the person who Red Teamed your document.

You have one last chance to be sure it's worth submitting. Has anyone in the audience no bid after a failed Red Team recovery? It does happen and I've seen it twice in 25 years. When you talk to Government evaluators and hear their complaints about contractor proposals, it should probably happen more often .... But that's a topic for another presentation!

And, in summary:

█ *Okay, so it's 10 steps, but that wouldn't have been a very good title.*



Nancy Kessler is VP, Regional Sales Director for Shipley Associates in the Washington, DC/MD/VA/PA region. Previously she was VP, Process Consulting for Shipley and also worked as a consultant. Her career as a proposal manager in industry evolved from her work developing resume and past performance databases. She has BA in Business and an MS in Technology Management. She can be reached at 703.391.5486/703.862.5486 or [nkessler@shipleywins.com](mailto:nkessler@shipleywins.com)