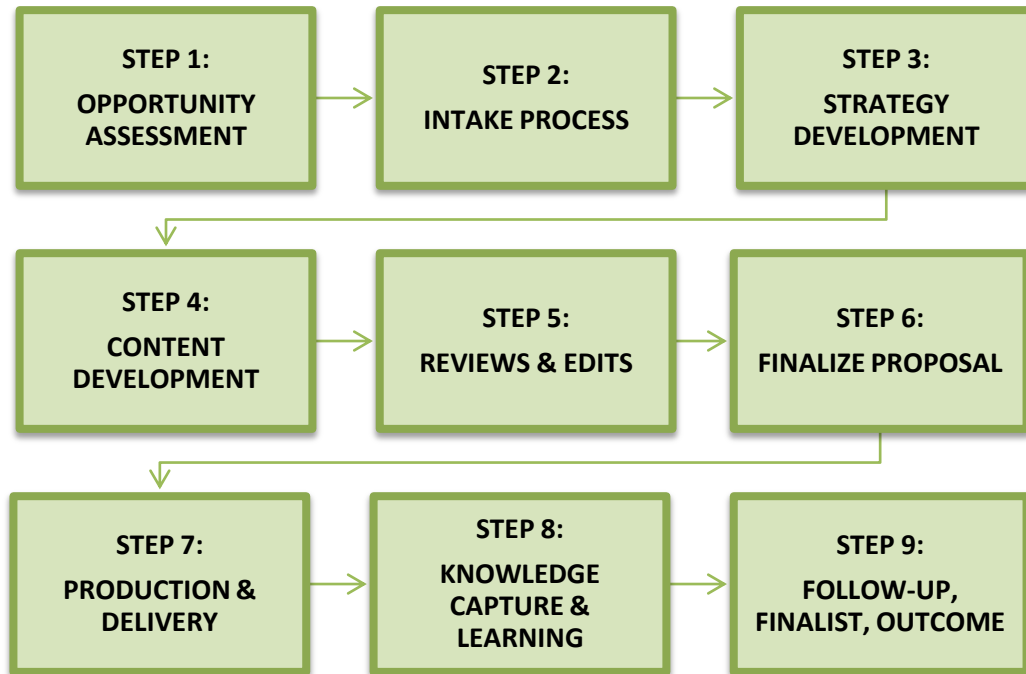


## Commercial Proposal Process

This 9-step process reflects best practices from healthcare organizations. How much time we spend on each step is significantly driven by the RFP deadline.



### 9-Step Process Details

The first column is the list of activities performed in each step and the description further defines the activity. The typical proposal team member responsible for the activity is identified in the third column and the last column outlines the proposal team's role as either owner of that activity or as a contributor with the owner being somebody outside of our department.

Step 1: Opportunity Assessment			
Activity	Description	Team Member Responsible	Owner or Contributor
Looking for/soliciting RFPs (pre-proposal activity)	Searching/subscribing to public sites or databases for RFPs that fit the company's services.	Production specialist	Contributor (Owner = sales)
Qualify the RFP	Review the RFP's requirements to assess the company's ability to (a) be compliant with requirements; (b) deliver a quality response; (c) win.	Team leader, proposal manager	Contributor (Owner = sales)

## Commercial Proposal Process

Make bid/no bid decision	Assess opportunity based on a pre-determined list of criteria and suggest a bid or no bid.	Team leader	Contributor (Owner = sales, executive)
<b>Step 2: Intake Process</b>			
<b>Activity</b>	<b>Description</b>	<b>Team Member Responsible</b>	<b>Owner or Contributor</b>
Submit Letter/Notice of Intent	Notify issuer of intent to bid, if required.	Proposal manager/writer	Contributor (Owner = sales)
Assign resource	Assign project to proposal team member(s).	Team leader	Owner
Develop project plan	Outline of tasks and deadlines to get the proposal completed and submitted.	Proposal manager/writer	Owner
Develop compliance matrix	Mechanism to ensure compliance with the requirements of the RFP.	Proposal manager/writer	Owner
<b>Step 3: Strategy Development</b>			
<b>Activity</b>	<b>Description</b>	<b>Team Member Responsible</b>	<b>Owner or Contributor</b>
Identify SMEs/team members	Identify the individuals that will need to be engaged and at what level for the response.	Proposal manager/writer	Owner
Analyze RFP	Identify gaps in services, red flags/concerns, threats, opportunities, questions, etc.	Proposal manager/writer	Owner
Conduct kick-off meeting	Invite all people working on the proposal. Goal is to level-set and inform. Example agenda includes: <ul style="list-style-type: none"> <li>• Review history with prospect/client (sales person)</li> <li>• Outline opportunity</li> <li>• SWOT analysis</li> <li>• Identify solution being proposed</li> <li>• Identify win themes/key messages</li> <li>• Review project plan</li> <li>• Outline roles and</li> </ul>	Team leader and/or proposal manager	Owner

## Commercial Proposal Process

	responsibilities of team members <ul style="list-style-type: none"> <li>Decide on privacy of content</li> </ul>		
Submit questions to issuer/attend pre-bid conference	Request for clarification on any aspect of the RFP or request for further information.	Proposal manager	Contributor
<b>Step 4: Content Development</b>			
<b>Activity</b>	<b>Description</b>	<b>Team Member Responsible</b>	<b>Owner or Contributor</b>
Set up proposal document	Copy and paste questions into the company's proposal template.	Proposal manager/writer	Owner
Create draft of executive summary	Outline key messages and themes; identify content most important to the executive team.	Proposal manager/writer	Owner
Pull standard content from the knowledgebase	Populate the proposal with standard content from the knowledge or content database.	Proposal manager/writer	Owner
Develop new content where required	Identify gaps in information and engage SMEs in helping to create content.	Proposal manager/writer	Owner
Request pricing proposal	Submit request for pricing proposal from the finance team.	Proposal manager/writer	Contributor (Owner = sales)

## Commercial Proposal Process

Customize messaging for specific client	Weave in key messaging and themes, use the issuer's name, customize solutions to meet the issuer's specific goals, highlight differentiators that resonate with the issuer, etc.	Proposal manager/writer	Owner
<b>Step 5: Reviews &amp; Edits</b>			
Activity	Description	Team Member Responsible	Owner or Contributor
First draft review	Send for review to Sales person, SMEs, proposal editor	Proposal manager/writer	Owner
Review compliance matrix	Ensure proposal requirements are being met.	Proposal manager/writer	Owner
Review project plan	Update or modify project plan, if necessary, and share changes with the team.	Proposal manager/writer	Owner
Gather attachments	Identify and gather documents to be attached with the proposal; edit, if necessary.	Proposal manager/writer OR Production specialist	Owner
Create second draft	Incorporate edits, finalize executive summary and further customize.	Proposal manager/writer	Owner
Second draft review	Send for review to senior sales/exec, sales person, proposal editor, communication department	Proposal manager/writer	Owner
<b>Step 6: Finalize Proposal</b>			
Activity	Description	Team Member Responsible	Owner or Contributor
Final editing	Incorporate final edits into the master proposal document.	Proposal manager/writer	Owner
Quality check – formatting	Ensure document is correctly formatted – i.e. page numbers, attachment numbers, styles, placement of graphics, pagination, etc.	Proposal manager/writer	Owner

## Commercial Proposal Process

Quality check – content	Final read through for flow, grammatical/spelling, and messaging.	Proposal manager/writer OR Proposal team	Owner
Final sign-off	Send to proposal owner for final approval and sign-off.	Proposal manager/writer	Contributor (Owner = sales)
<b>Step 7: Production &amp; Delivery</b>			
Activity	Description	Team Member Responsible	Owner or Contributor
Produce/Send for production	Print, compile, bind, package, and ship proposal. Or manage outsourcing of these activities.	Production specialist OR Proposal manager/writer	Owner
Final quality check of document	Check final layout of document before burning to CD.	Production specialist OR Proposal manager/writer	Owner
Create and send electronic file	Compile proposal into one file (if possible), create .zip, write email message, and submit proposal.	Proposal manager/writer	Owner (sometimes sent by sales person)
Save finals to proposal library	Save all files in their native files in the proposal library.	Proposal manager/writer OR Production specialist	Owner
Track to delivery	Track package and email to ensure timely delivery and receipt by the client.	Production specialist OR Proposal manager/writer	Owner
Notify sales lead of delivery	Send email to sales person to notify them that the proposal has been delivered successfully.	Production specialist OR Proposal manager/writer	Owner
<b>Step 8: Knowledge Capture &amp; Learning</b>			
Activity	Description	Team Member Responsible	Owner or Contributor
Identify new or updated information	Pulling out information from the proposal that was either new or updated information to be put into the knowledgebase.	Proposal manager/writer	Owner

## Commercial Proposal Process

Make content generic and upload	Generalizing the content and putting in placeholders/prompt text in preparation for upload to the knowledgebase.	Knowledgebase manager OR Proposal manager/writer	Owner
Conduct lessons learned meeting	Meeting with project team to discuss what worked well and what didn't work well to drive continuous process improvement.	Team leader	Owner
<b>Step 9: Follow-up, Finalist, Outcome</b>			
<b>Activity</b>	<b>Description</b>	<b>Team Member Responsible</b>	<b>Owner or Contributor</b>
Respond to follow-up questions	Create responses to any post-proposal questions.	Proposal manager/writer	Contributor (Owner = sales)
Provide data for finalist presentation or site visit	Provide input or content for the finalist presentation or site visit.	Proposal manager/writer	Contributor (Owner = sales)
Follow-up with the sales person on the final outcome	Request updates from the sales person on the outcome of the sale.	Proposal manager/writer	Contributor (Owner = sales)
Record and share proposal win/loss data	Request win/loss data from the sales person once the process has been completed and record and share the data.	Proposal manager/writer	Contributor (Owner = sales)
Create weekly status report	Run report on activity and status of all RFPs. Share with executive leadership and sales leadership.	Team leader	Owner
Submit request of other proposals	In public bids, submit requests to get access to competitor's bids. Compare and contrast offerings to drive improvements and share competitive intelligence with others in the organization.	Proposal manager	Owner