Proposal Automation

What It Means and How To Get Started

Presented Thursday, July 19

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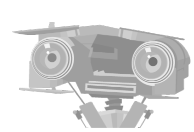
We plan to regularly review and refresh this documentation so be sure to sign up for the CKearney Consulting newsletter on our website to be notified of updates.

Proposal Automation Scorecard

	Yes	No
1. Do you have a CRM system?	25 pts	0 pts
2. Do you have your proposal process and project lifecycle documented and mapped?	20 pts	0 pts
3. Does your firm have more than one office?	10 pts	0 pts
4. Do you have a significant population of your firm that is close to retirement?	10 pts	0 pts
5. Has your company recently experienced losing a project pursuit they could have won if they were more organized or strategic with pursuing projects?	10 pts	0 pts
6. Is your leadership frustrated with updating resumes every proposal or complain about finding the same mistake in submittals?	15 pts	0 pts
7. Do you have a champion in an influential role backing your efforts to move forward with streamlining your proposal process and move forward with automation?	10 pts	0 pts

PA Score Results

0 – 24 Points :: Minimal Automation
25 – 55 Points :: Semi Automated
56 – 100 Points :: Majority/Fully Automated



Proposal Automation (PA) Resources

56 – 100 points :: Majority/Fully Automated

Congrats, your firm is close to reaching proposal automation or has already done so. If you are fully automated, we have some tips to help maintain or optimize your process. If you are not yet 100% automated, we have resources to move you forward with implementing proposal automation.

If you do **not** have a CRM and would benefit from a comparison of CRM and a checklist to use while evaluating options, refer to the documentation for the 25-55 point range. Refer to that documentation for a process map and checklist guiding you through the steps to create and update the mapping.

If you **do** have a CRM system that is not fully functional or one that is not yet producing automated proposal, reference the previous documentation. Refer to it if you have a clear process mapped, to learn how to review it from all perspectives.

Maintenance or Audit Reports

To maintain your automated process, remember to ABD (Always Be in your Data). Create Maintenance or Audit Reports and run them regularly. Here are some examples:

- Resumes
    - **Staff Team.** Look for projects *without* a staff team listed on the project.
    - **Images.** Look for personnel records *without* an image.
- Project Data
    - **Completion Date.** Look for projects *without* a completion date.
    - **% Complete.** Look for projects *without* the fields populated you are using to calculate your percent complete.
    - **Cost.** Look for projects *without* cost fields populated.
    - **Consultant Team.** Look for projects *without* an architect, engineer or GC whatever team members you track on your projects.
    - **Size.** Look for projects *without* the size field populated.
    - **Contract Type.** Look for projects *without* a contract type.
    - **Categories.** Look for projects *without* a category populated.
    - **Firm Org.** Look for projects *without* a selection tied to your firm org or company structure (market, office, division, profit center, services)

- Integrations
  - Are you regularly checking if the integrations are firing and functioning?
  - **Employee IDs.** Look for personnel records *without* an employee ID if your integrated systems are using that field to connect to your CRM.
  - **New Records.** Review new records created to ensure your integrations are working if they are supposed to create new records.
- Clients
  - **Company Type.** Look for records *without* a company type, if you are classifying company records with a type.
  - **Addresses.** Look for records *without* address information, if that is important information to you.
- Contacts
  - **Contact Type.** Look for records *without* a contact type, if you are classifying company records with a type.
  - **Addresses.** Look for records *without* address information, if that is important information to you.
  - **Orphans.** Records *without* an internal staff member listed as an owner.
  - **Emails.** Look for records *without* an email addresses, if that is important information to you.
- Opportunities/Pursuits
  - **$5 or less.** Look for records *with* the value less than a certain amount.
  - **Closed Opps.** Review closed records for fields that are needed for other systems or modules.
  - **Hit Rates.** Know what kind of hit rate you want to report on and ensure those classifications are populated on all records (won/loss, interviewed, shortlisted, hit rate by category)
  - **Date.** Look for records *without* a date field populated if workflows are triggered off that date.
  - **% Complete.** Look for records *without* the fields populated you are using to calculate your percent complete.
  - **Cost.** Look for records *without* cost fields populated.
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Notifications

Are there any notifications that could improve functionality? Email triggers to users? Logic triggers to set certain fields to a different value?

Here are some examples:

- Notification to accounting when a pursuit is won.
- Send the project completion report to the project lead to get project data reviewed and updated.
- Notify certain team members when a new lead or new client has been created.
- Tracking events or contacts in other platforms and/or medias through API integrations
- Automate the go/no go form
    - Build the form in your CRM to be filled out and completed
    - When the score is above a certain number a notification goes to a group of key decision makers
- Project alerts or reminders
- Pursuit approvals based on dollar value or other criteria
- Notifications when a certain event, call log or task activity occurs
- Automated project report with a set list of fields at project milestones
    - At 25% complete send basic data (dates, dollars, scope, team) to be reviewed and confirmed
    - At 50% send additional information (partnering team information, award narratives about innovative technology)
    - At 75% send all information to be reviewed and completed
    - At 100% complete the project lead signs of on all data
- If you have client account managers or champions, set a trigger to notify them if anything changes with the company record
- Date triggers on license registrations for the firm and staff to be notified x number of days prior to expiring