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Can Your Proposal Process Be More Agile?

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Questions to Explore

Shipley and other proposal industry best practices have been around for 30 years – is it time for change?

Do Agile and Scrum principles have a place in Proposal Management?

What can I do NOW to be more Agile?

Agenda

- Agile and Scrum Principles
- Sprints
- Roles
- Backlogs
- Burndown
- DONE!
- Scrum or ScrumBUT?
- Take-Aways

Evolution Parallels

Software Engineering

- **SDLC Methods**
  - Waterfall
  - Spiral
  - Incremental Development
  - Prototyping
  - Rapid Application Development
- **Agile Methods**
  - Extreme Programming
  - Scrum
  - Adaptive software development (ASD)
  - Dynamic system development method (DSDM)

Proposal Management

- Ad hoc
- Shipley
- APMP
- Home grown

Agile Manifesto

Individuals & Interactions over Processes and Tools

Working Software over Comprehensive Documentation

Customer Collaboration over Contract Negotiation

Responding to Change over Following a Plan

Agile

- Collaborative team effort
- Focus on the *Solution*
- Constant collaboration between team and customer
- Iterative activities

Waterfall

- Hierarchical roles
- Focus on the *Project*
- Set requirements (and sometimes solutions!)
- Sequential Activities

Official Scrum Definition

A development framework based on empirical process control wherein cross functional, self organizing teams deliver working software [products] every thirty days (or less).

Key Elements:

- Focus on the customer
- Extensive collaboration and communication (among the "developers")
- Team building
- Flexibility
- Focus on the highest priority elements

Hmm…. Sounds like what we (should) do!

Five Values of Scrum

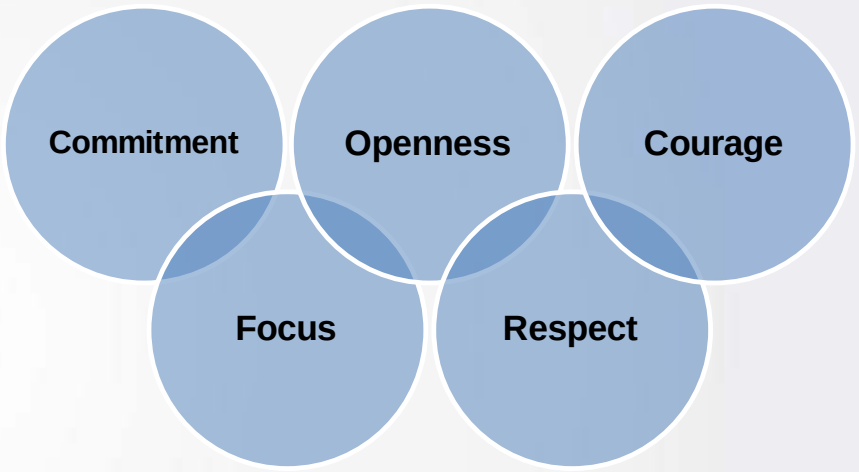
Focus – Make sure work is prioritized; attention to the definition of DONE.

Courage – Work to remove impediments; make bold decisions about strategies and solutions, and stand by them.

Openness – Open to new ideas – foster innovation in solution; full disclosure and awareness about competition and customer needs.

Commitment – Willing to be adaptable; follow-through on commitment to the team and to the definition of DONE.

Respect – Trust in the team; roles are transparent; everyone is equal.



Yes – Yes – Yes – Yes – Yes

Individuals and interactions over processes and tools

Sprints

3 Primary Characteristics of a Sprint

Characteristic	Software Engineering	Proposal Management
1. Time-Boxed	• Refers to a fixed period of time that the team works • Typical duration is 2–4 weeks or a calendar month at most • Product is designed, coded, and tested during the sprint	RFP Release to Delivery is the Time-box (one sprint)
2. Protected	• Stories being implemented in the sprint do not change	The requirements are fixed (in the RFP) and prioritized
3. Iterative and Incremental	• Work iteratively to code, test, and improve the software product	Work iteratively to write, review, and improve proposal content

Roles

Software Engineering	Responsibilities	Proposal Management
Product Owner	• Voice of the customer • Ensures priorities, aligns strategy, owns the solution	Capture Manager
Scrum Master	• The Servant Leader, removes impediments • Teaches, leads and coaches • Facilitates all meetings	Proposal Manager
Development Team	• Works collaboratively to deliver the product	Writers, Graphic Artists, Editors, Desktop Pub, etc.

Other Scrum Parallels

Software World	Proposal World
Epic	All lifecycle deliverables (RFI response, RFP response, Orals, ENs, FPR, etc.)
Sprint	The entire proposal document
Stories	Aspects of the solution (proposal sections)
Task	One requirement or “shall” statement
Product	Proposal
Release Planning	Proposal planning & kickoff meeting
Code	Proposal text
Done	Ready to ship proposal
Release	Complete proposal
Testing	Color reviews

Backlogs

Software Eng.	Description	Proposal Mgmt.
Product Backlog	A single dynamic list of features prioritized by value to the customer	PWS / SOW
Sprint Backlog	Set of work from product backlog that team agrees to complete in a sprint, broken into tasks required to implement a feature	Compliance Matrix / Writing Assignments
User Stories	Aspects of the solution, told from the customer's perspective	Storyboards / Annotated Outline / Features & Benefits

Stories

Scrum User Story Formula:

As a <customer>, I want <goal>, so that <outcome/benefit>

Proposal User Story Formula:

To satisfy <customer>'s need for <goal>, we offer <feature> which will result in <outcome/benefit>, as demonstrated by <proof>.

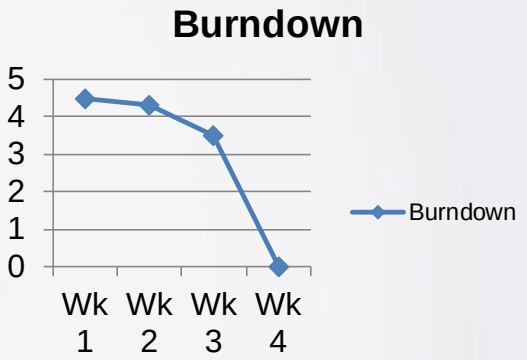
Daily Scrum

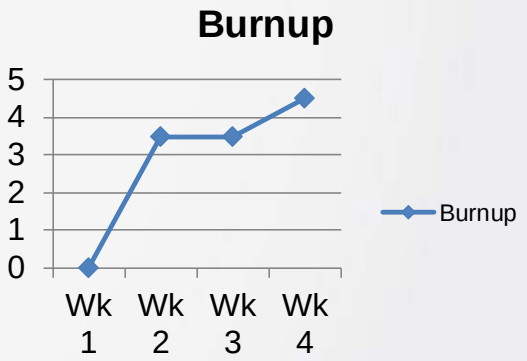
- Daily check-in
  - What did I accomplish yesterday?
  - What will I do today?
  - What obstacles or questions do I have?
- 15 minutes or less

Many proposal teams hold a Daily Standup following a similar model!

Burndown / Burnup Charts

Software Engineering	Proposal Management
Burndown Chart	
Work Remaining	Proposal Sections Remaining
Burnup Chart	
Completed Work	Proposal Sections Completed





Can be used to Manage the Proposal Calendar / Writing Backlog

DONE!

How does Scrum define “done”?

Done is an agreed upon quality bar that each Product Backlog item must go though to be considered done

Software Engineering	Proposal Management
• Coded • Tested • Releasable • An increment of product built that is potentially shippable	• Color reviews completed with high evaluation scores • Compliant • Responsive • Feature Rich • Customer Focus • Win themes obvious • Printed and packaged • Proposal ready to deliver!

Retrospective

Software World	Proposal World
Lessons learned at the end	Debrief and post-submittal review

Agile is all about experimenting, inspecting, adapting and sharing lessons learned

Scrum or Scrum*BUT*?

- ScrumBUT is what most development teams are doing – only following some of the practices
- Proposal Management will do ScrumBUT – some of the practices will be relevant, but not all

Benefits from Agile

- WE is smarter than ME
- Reduced risk
- Customer focus
- Cross-functional visibility
- Team focus
- Perpetual improvement
- Continuous requirements validation
- Transparency (total ownership)

Take-Aways

SCRUM for Software Engineering vs. Proposal Management…

Where there is synergy:

- Both are team efforts
- Both must adhere to rigorous rules
- Both subject to time and budget constraints
- Both are focused on the customer and producing a working (winning) product

Take-Aways

Differences/Challenges:

- Co-location of team (sometimes)
- Time and backlog – strictly bounded
- Involving the actual “customer” (sales or capture must be the customer’s voice!)
- Continuity of team from one proposal to next
- Cannot drop lower-priority requirements – all must be addressed
- Requirements may change mid-Scrum (Amendments)

Take-Aways

- How can Proposal Teams be more Agile?
  - Focus on the customer
  - Embrace team building – collaboration / communication; reduces conflict
  - Embrace flexibility
  - Adopt the 5 Scrum values (commitment, openness, courage, focus, respect)
  - Use Burndown charts to improve time management and increase accountability/visibility
  - Use Backlog prioritization – that which scores the most points gets the most attention (but address everything!)

Take-Aways

- How to be more Agile, cont'd
  - Strive for co-location of the team
  - Remove impediments
  - Focus on customer's highest priorities/needs
  - Improve accountability and visibility through frequent check-ins – the Daily *Scrum*
  - Use frequent testing and validation – changing the Color Team philosophy
  - Hold a Retrospective – what can be improved next time?
  - Keep an open mind about the future…

Thank You

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