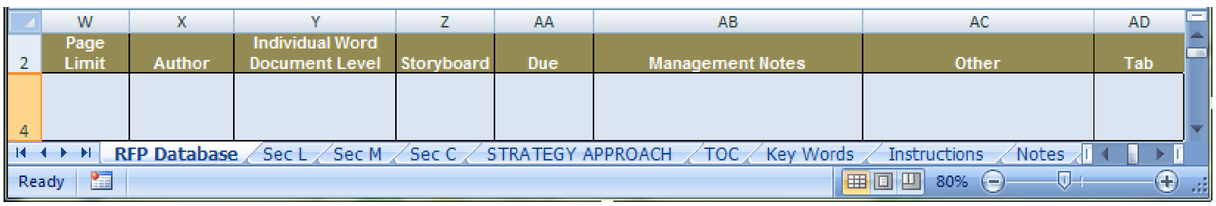
Adding Additional Mgmt and Strategy Info

After you have created the Outline based on Section L and made adjustments depending on Section M and Section C, it is time to start assigning authors, page limits, and adding other notes to the document that will help develop the Storyboards and Compliance Matrix.

NOTE: You may have had to map to other portions of the RFP such as Section J for certain Task Order requirements. You complete these sections just as you completed Section C above. You must let the Proposal Geek staff know when you would like them to parse other sections of the RFP. By default, they will only parse C, L, and M.

The shaded areas are fairly self-explanatory but the next few paragraphs give you brief instructions for each column heading. These headings can be altered to accommodate your company needs.



Completing the Shaded Areas of the RFP Database. *The shaded area contains critical information that will provide further instructions to the Writers in the Storyboards.*

Strategy ID and Strategy Approach: If you added any specific strategies or themes that you want to ensure are written to in various paragraphs, you can use the drop down menu on the Strategy ID column. The text for the Strategy Approach will appear in the next column. Don't worry about being able to see the full text. Remember that this worksheet is just the backbone for mapping all the requirements. You will be running other various reports that will format and show the specific information from this worksheet.

Proposal Page: This column contains a formula that works with the TOC tab to populate the RFP Database with actual page numbers near final production. You can choose to type over any of the formulas that you choose. You can hide this column for now since it will have a lot of errors showing.

Page Limit: The RFP will give you the basic page allocations. You will need to reallocate those limits down to the individual sections so that the writers know exactly what is required of them. REMEMBER, a standard industry practice is to only allocate 90% of the pages during the initial draft. It is much easier allowing a writer an extra page than it is to take a page away from a writer after his section met your initial allocation.

Author: This is the name of the Author , Teammate, or Functional responsible for this section. This name will show up on the Expanded Compliance Matrix and on any assigned Storyboards.

Individual Word Documents: You will want Individual Word Documents at various levels. Obviously, you can't create the entire proposal in just one Word document. That would mean only one person could work on the proposal at a time. On the same note, it is time-consuming to have the writers open and close multiple documents if you create a document for each individual paragraph number. Look over the spreadsheet at the authors and page allocations to determine where you think a new document should start. ***Place an X*** in the column to indicate the start of a new document; all the sections from that point to the next X will be in that Document. This column is used to run the Individual Document Creator (IDC) tool that will create all the Word documents for you. ***You should ALWAYS have an X on the first Row.*** If not, the information from the top Rows will roll up into the Sample Document that is created.

Storyboard: This is where you decide which sections you want Storyboards created. Storyboards are for high level planning of the sections. ***Place a Y*** by each proposal section that you would like a Storyboard.

NOTE: Storyboard Wizards will only show information that is on the same row as the Y.

Due: This is the due date that you are requesting the Storyboard be completed. For larger proposals, you may want to stagger these dates. For smaller proposals, you may want the dates to be the same.

Management Notes: By the time you get to this column, it is a good idea to get the Capture Manager or another Proposal Manager to review your work. The Capture Manager or Program Manager may want to add comments regarding any of the particular requirements of the RFP. They may want to add specific strategy or insight that they would like to see included in the proposal. Notes entered on the Storyboard row will also show up on the Storyboard. This is a great way to ensure their key thoughts will be delivered to the writer. Use this column to place any additional instructions or comments to the Writers.

Other: This is an area for you to write any other comments or to point to other sections of the RFP. You might want to let a writer know that the full vehicle list can be found in Section H or that Section J contains a list of all the staffing requirements or a Sample Scenario that they must cover in the proposal.

Tab: This is where you indicate that you want Tabs in the binder. ***Enter a T*** for tab. This column is NOT used in any of the Compliance Matrix or Storyboard Wizards. It is for planning purposes only. Some RFPs will request certain tabs. You might want to add the actual names of the tabs in this area rather than just putting a T.

Special Requirements: You can choose to add more columns such as Hot-Buttons, Company Strengths, or other Capture-related items. If you do this, you can ask Proposal Geeks to add these columns for you for future parsed RFPs. We can also help you tailor your reports so that the reports also show these items.