

Preparing for Color Review Recovery

The bulk of the consolidating, assigning, and tracking the status of the comments is done on the Excel Score Card. This was covered in the Preparing for a Color Review section. The text below is an excerpt from that section.

- ▶ Save a copy of the Proposal Geek Excel Scorecard in the Color Review Team folder and make necessary updates or customizations. There is a Scorecard for four colors or five colors. Check Section M (Evaluation Criteria) of the RFP to determine which Scorecard is better for you.

- ▶ *On the Author Tab of the Scorecard, enter the Author names that are working on the Proposal.*

This will help the Proposal Manager assign responsibilities to individual edits and comments from the Color Review.

	A	B	C
1	Author Names		
2	Assigned Options	Action Options	Status Options
3	Author 1	Accepted	Completed
4	Author 2	Accepted w/Comments	Incomplete
5	Author 3	Rejected	
6	Author 4		
7	Author 5		
8	Author 6		
9	Author 7		

- ▶ *On the Master Scorecard Tab, enter in the Volume Names for the proposal. Adjust the weight for each Volume under the Govt Weight column.* This will give your company an idea of how the entire Proposal Stacks up against the weights from the Government. Place a zero (0) by any extra Volumes you are not using or delete the Rows that you are not using. For instance, if there are only 4 Volumes and the Proposal Stated that 1 is more important than 2. 2 is more important than 3. That 3 and 4 are equal in importance, then you might change your Volume and Weights Something Like This: 1.0 Management (35%); 2.0 Technical (25%); 3.0 Past Performance (20%); and 4.0 Cost (20%). Then you would place 0% in the Generic Volumes 5 through 10.

	A	B	C	D
1	Proposal Name			
2	Overall Score	Green		100
3	Volume	Vol Score	Govt Weight	Weighted Score
4	1.0 Volume Name	100	10%	10
5	2.0 Volume Name	100	10%	10
6	3.0 Volume Name	100	10%	10
7	4.0 Volume Name	100	10%	10
8	5.0 Volume Name	100	10%	10
9	6.0 Volume Name	100	10%	10
10	7.0 Volume Name	100	10%	10
11	8.0 Volume Name	100	10%	10
12	9.0 Volume Name	100	10%	10
13	10.0 Volume Name	100	10%	10

- ▶ Make sure all reviewers have access to the share and are mapped to the corresponding drive. Or Send them their A and B documents if they are working remote. **NOTE: If you are using a Template rather than a DOCM, you will have to tell them how to attach the template to the A document if they are working remote.**

- ▶ Ensure that each reviewer will have their own laptop or desktop computer with Word 2007.

Once you have the Master Scorecard Tab and Author Names set up, you can believe to cut and paste text from the Word “B” documents into the appropriate tabs. These steps are covered in the next topic.