



Red Team Blues

Making the best of it

BY LINDA WOLSTENCROFT

Red Team reviews of proposals are often fraught with stress because of the impending submission deadline. There are principles to observe that can make this process easier and yield better results.

Over the course of several Red Team reviews, I have seen some done very well and some done not so well. In most cases, the review excelled in some areas while failed in others. The best Red Team reviews are those that are designed to minimize shortfalls.

One of the best Red Team reviews I have experienced was well-run in many respects. The proposal leaders did a good job of identifying the expertise required for the review and brought in people who had such expertise. As well, the leaders understood that the Red Team review would be a perfect setting to improve the understanding and increase the buy-in of key project stakeholders who were not involved in the writing but would be involved in the approval of the proposal and the execution of the contract. The Red Team produced a high volume of valuable comments that covered the full range of subjects and issues covered by the proposal. Together, the various comments worked synergistically together to improve the probability of win for the proposal.

On another recent Red Team review, just about everything was done wrong. One executive was too far removed from the process to provide any real value, except from the perspective of a strong customer relationship. A second executive (whose employment turned out to be short-lived) stated that he did not want to have a detailed understanding, but merely wanted it done right. Yet a third executive, who had no background in proposals, adamantly refused to take advice from the experts on the team.

Needless to say, this proposal failed to meet the mark in many ways.

ALLOWING THE EPIPHANY TO HAPPEN

Realizations are the set of “eureka” moments that come to the reviewers. These are the bases for epiphanies. Some realizations may just come in the form of small refinements. Others may be more significant in that they push the solution to the next level. And finally, some realizations could make-or-break compliance issues that had been unintentionally overlooked. Whatever the case may be, it is essential to create the time and space to allow for these epiphanies to happen. And if a typical reviewer produces at least five of these, this amounts to tremendous value.

Expertise of the team must cover the full spectrum of the proposal. This includes operations experts, technical experts, logistics experts, project management experts, financial experts, economic benefits (ITB) experts, and marketing / sales / business development experts. The full set is required. And the expertise brought needs to be current, not years old.

Details, details, details. The Red Team has to pay close attention to details. Every word needs to be reviewed and interpreted. Proposal authors working on a time schedule or as an “extra” duty may not pay close enough attention to detail. It is up to the Red Team to identify these shortfalls. One Red Team I was part of had a few reviewers on a particular section. Each had a different background and expertise. Each caught deficiencies in their own area with only one or two of the reviewers reading in such detail that they caught a major non-compliance issue.

The **total** proposal should be reviewed. Typically, the focus is on the text of the technical

and management proposals. But with the economic benefits (Industrial and Technological Benefits (ITB) proposal now being rated in Canada, this has become of extreme importance. Old school (Industrial and Regional Benefits (IRB) writers and reviewers are no longer valuable; the new requirement is to produce a document that can shine in the eyes of the evaluators. Another often-missed area is the costing review. As I have said before, the cost accuracy, assessment of risk, and the challenge of the costs, is really important. So many times a proposal team goes into a final pricing review with only estimates. Then, when questioned by the executives the risk is found to be too high, and by then it is too late.

Early performance of the Red Team review compels the authors to work faster and allows time to effect changes brought forth by the Red Team.

Acceptance of expert advice by leadership is critical – the personality flaws of “need to be right” or to appear as “the smartest person in the room” have no place here. If leadership does not have the experience and expertise, they should listen to those that do.

Messages and win strategy – this is perhaps the most important. How will your proposal stand out from the rest? What will compel the customer to pick you? How will you score the highest in accordance with the evaluation criteria?

In summary, the Red Team principles are:

Realizations **Expertise** **Details**
Totality **Early** **Acceptance**
Messages

By the time you’re at Red Team you have invested significantly in a capture campaign and a proposal development effort. So, go the extra mile to do this right.

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