



OST GLOBAL SOLUTIONS



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## How to Build a Proposal Schedule

...That Will Prevent  
Headaches, All-Nighters,  
and Missed Deadlines



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### About OST Global Solutions

OST Global Solutions is a Metro Washington, DC company helping businesses grow organically through end-to-end business development support and training. We have built the Federal Business Development (BD) Center of Excellence and Bid & Proposal Academy to help government contractors succeed by managing all aspects of the BD lifecycle that have the greatest impact on your probability of winning through:

- Implementing the Winning Edge Package
- Building your Indefinite Delivery/Indefinite Quantity (IDIQ) Vehicle Portfolio
- Filling and Managing Opportunity Pipelines
- Capturing the Single Award and Task Order Contracts
- Developing Winning Proposals
- Developing a Winning Cost Strategy and Cost/Price Volumes
- Leasing proposal center facilities
- Providing reports, tools, manuals, and self-study courses to become more competitive

Our Bid & Proposal Academy offers public courses, distance learning, and corporate classes and workshops, as well as six professional business development certification tracks. Our courses incorporate foundations and advanced topics in:

- Business Development
- Capture Management
- Proposal Management
- Estimating and Price Strategy
- Proposal Writing, Outlining, Desktop Publishing, Graphics, and Editing
- Win Themes and Win Strategy Development
- IDIQs and Task Orders

Our courses go beyond the why, who, what, and when that typical process-focused courses cover. We focus on how to win in the trenches of today's government services and solutions industries, offering practical and immediately applicable skills.

**Quick facts about OST:** We have a track record supporting 18 out of the top 20 Federal Contractors, winning more than \$20 Billion since 2005. Our customer list includes not only large businesses, but mid-sized and small disadvantaged firms. We understand the special challenges facing businesses with limited infrastructure and resources, as well as those who are too large to take advantage of Government socioeconomic programs but who are still small fish in a big pond.

**Contact Us to Experience Success Growing Your Business by Winning Government Contracts!**

**Call:** 301-384-3350 • **Email:** [service@ostglobalsolutions.com](mailto:service@ostglobalsolutions.com) • **Web:**  
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The Request for Proposal (RFP) is out, the clock is ticking fast, and you are the Proposal Manager. Given the tough job you have ahead of you, and given your understanding of the proposal process, you must develop a detailed schedule as you would for any complex project.

To get started, download the current calendar from [www.timeanddate.com/calendar](http://www.timeanddate.com/calendar); if you are more engineering-minded and are trained in Microsoft Project, set up a proposal schedule with a critical path. You can reuse and modify this type of schedule more easily, although fewer people sight-read a Gantt Chart as fluently as the calendar format.

Building a proposal management schedule immediately after you figure out the RFP deadlines and available resources is critical. Your schedule is your proposal plan that serves as a roadmap for the next (however many) days or weeks the government has given you to respond. It helps you visualize whether you are at an advantage or disadvantage for time, and communicate the plans visually to your team on the proposal. You can also measure your



progress over time against the milestones you've set up to see whether you are on track to completion, and what needs to happen to catch up.

To build a robust proposal management schedule, you must treat the proposal like a project with key milestones and typical proposal tasks to complete by the interim deadlines you set. With the project manager's hat on, visualize walking through the entire proposal process, noting any tough spots you may run into due to short deadlines, shortages of writers, lack of availability of subject matter experts, key people's vacations or medical procedures happening in the middle of the proposal, reviewers' unavailability, and any other problems you may encounter. Jot down risks and potential pitfalls you could run into, such as major holidays coming up, with people wanting to spend time away with their families. How will you handle weekends? What will you do if one of your major proposal contributors has a life emergency and can't continue to work on the team?

Also, don't forget about long-lead items that may impact your ability to respond: a large proposal size with multiple hard copies required that you need to ship to a remote location; past performance references deadline that comes ahead of the proposal submission deadline and that requires your hard-to-pin-down customer to respond; resume requirements for dozens of personnel you are yet to recruit, and so on.

Once you have come up with a list of potential pitfalls to avoid, and you have visualized getting the proposal to the finish line, start putting down key dates. Begin with the proposal submission deadline, adding the due date for your proposal first.

For our example, let's assume a 30-day duration. Start planning backwards, from the deadline to the proposal start. If you are required to produce a hard copy of the proposal, for an up to 1000-page deliverable, plan about 2 ½ days for production and delivery; otherwise, a 1 ½ days should suffice. This may seem like a long time, but Murphy's law is never so manifest as during the last proposal days when you are doing production, book check, and delivery. Too many Proposal Managers can attest to printer jams, misprints, running out of ink, running into bad traffic while hand-delivering the proposal, having packages lost by FedEx or UPS, flights delayed or cancelled, or any other number of mishaps. These rarely happen unless you have a pressing deadline. Give yourself triple the time you think is necessary, just to be safe.

Schedule a Gold Team or executive review and signoff for your proposal, and some time to recover after that and incorporate changes, if any. Your proposal should be 99.99 percent ready by the Gold Team. Then, be sure to plan ample time for editing and formatting (desktop publishing) of your proposal, backing out at least 2-3 days. Determine key dates for the Read-Aloud session (where you take turns reading your entire edited and desktop-published proposal as a team and correcting consistency errors), Red Team (where your proposal is 90 percent customer-ready), Pink Team (where your proposal is 60 percent customer-ready), and

Kickoff (where you have your proposal outline, assignments, and plans ready), in that order.

For short-duration proposals 7 days and under, you don't have to fit in all the color teams, but should allow for at least one review. A good rule of thumb for scheduling a Red Team is to build it into your schedule at about 70 percent of your entire schedule timeframe. Another good rule of thumb is to spend 40 percent of your time in the section planning stages prior to the Pink Team, 20 percent in the writing stage between the Pink Team through the Red Team recovery, and another 40 percent from the Red Team recovery through the editing and polishing stage.

Don't forget to include "pens-down" time for all the writers before the reviews to allow the proposal manager to spend some time with the document prior to each review. These pens-down deadlines serve the additional purpose of giving procrastinators an early deadline to miss, so that the review will not be compromised by materials that are not available to read.

Schedule review dates tentatively. Leave a day or so of wiggle room to accommodate the schedules of important attendees such as busy subject matter experts or upper management. Allow time for recovery between the reviews: don't schedule a Pink Team and then a Red Team 2 days later. On a 30-day proposal, at a minimum, you should leave 4 days between reviews; ideally, up to a week.

Don't omit deadlines that are specific to this customer and this proposal. Don't forget such milestones as the Intent to Respond submission deadline, Bidders' Conference, the deadline for your questions to the customer, the deadline for submission of past performance questionnaires to your references, past performance deadline (if different from the proposal due date), and your Price Volume preparation milestones and reviews.

Finally, leave the proposal manager a minimum of 3 ½ days to parse the RFP requirements and create a compliance matrix, develop an annotated outline, prepare assignments, hold meetings with the management and assign resources, issue invitations to upper management for reviews, and develop a Kickoff presentation.

A sample schedule on the following page is for a 30-day bid that requires a hard copy delivery to a remote army base in Arizona. It outlines not only the major internal deadlines for the proposal team, such as color reviews and shipping, but also includes dates when questions to customers are due and when the proposal manager is holding in-process reviews.

It's important to get your team to understand that developing a complex, detailed document like a proposal requires multiple short iterations of only a few days dedicated to maturing an entire document. Each proposal should have multiple passes to get it perfect. Getting your proposal team to buy-in on this fact will ensure greater cooperation and a smoother process.



## Schedule Example

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				<b>May 3 RFP Release</b> •Meeting on Resources etc. •Issue invitations	<b>May 4</b> •RFP Parsing •Brainstorming •Assignments preparation	<b>May 5</b> •Outlining
<b>May 6</b> Kick-Off Presentation Preparation	<b>May 7</b> <b>9:00-15:00 EDT – Proposal Kick-Off</b>	<b>May 8</b> <b>Brainstorming and drafting start</b> •Cost Strategy Meeting	<b>May 9</b> •Drafting continues <b>16:00 EDT In- process review</b>	<b>May 10</b> •Drafting continues <b>•Start Cover Design</b>	<b>May 11</b> •Drafting continues <b>16:00 EDT In- process review</b>	<b>May 12</b> •Drafting continues
<b>May 13</b> <b>Proposal Team Day Off</b>	<b>May 14</b> •Drafting continues <b>•Subcontractor Estimates Due</b>	<b>May 15</b> <b>12:00 EDT – Pink Team Pens Down</b>	<b>May 16</b> <b>9:00-18:00 EDT</b> <b>Pink Team and Debrief</b>	<b>May 17</b> <b>•Pink Team Recovery</b> •Section work continues	<b>May 18</b> <b>•Section work continues</b> <b>Questions to the Customer</b>	<b>May 19</b> <b>12:00 EDT In-process review</b>
<b>May 20</b> <b>Proposal Team Day Off</b>	<b>May 21</b> •Section work continues <b>18:00 EDT – Red Team Pens Down</b>	<b>May 22</b> <b>Red Team formatting and light edit</b>	<b>May 23</b> <b>9:00-18:00 EDT Red Team Review and Debrief</b>	<b>May 24</b> <b>Red Team recovery</b> <b>•Cost Volume Ready</b>	<b>May 25</b> <b>Red Team recovery</b> <b>18:00 EDT Gold Team Pens Down</b>	<b>May 26</b> <b>Formatting and editing</b>
<b>May 27</b> <b>Contingency</b>	<b>May 28</b> <b>Formatting and Editing</b>	<b>May 29</b> <b>Formatting and Editing</b> <b>12:00-16:00 Gold Team</b>	<b>May 30</b> •Gold Team Recovery •Printing and Book Check	<b>May 31</b> <b>Contingency</b> •FedEx shipping and Flight to AZ	<b>June 1</b> <b>4 PM EDT – Proposal Delivery in AZ</b>	

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### What Our Customers Say About Us

*"We would like to thank you for working with us. We won the last contract when we used this service and would happy to recommend it to anyone that wants to win. We are very happy with your work as well as your company's customer service and professionalism."*

— Steven Marlin, Director of Logistics / Contracts Officer,  
**Hewad Dost Group (HDG)**

*"You did in 10 hours what I have been working on for 1.5 years. Great job! Thanks for all your help."*

— Cliff Ingari, Senior Vice President, **AVT Simulation**

*"Your hard work was the major reason we won this bid. (C-TNOSC)."*

— Diane E. Justice, Vice President, Defense Sector, **STG, Inc.**

*"OST Global Solutions training and webinars hit the mark every time. The curriculum is focused on the needs of business development professionals in a hyper-competitive marketplace. They not only identify the most common pitfalls, but also demonstrate in detail just how to write winning proposal sections. The recommendations are succinct and actionable."*

— Ciro Pinto-Coelho, Director, Strategy & Business Development,  
**Raytheon Company**

*"Thanks for all you did to bring order and discipline to our rapid proposal response. I especially appreciate your patience as we worked through the intensity of bringing the proposal to a final response. Your contributions were noted by our SVP and COO."*

— Jay Carroll, Director, GWAC Programs, **STG, Inc.**

**Reach out to us to help you win contracts, because there is no second place in proposals!**

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