

Winning Proposals – Best Practices

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NORTH CAROLINA
the state of minds™

Winning Proposals – Best Practices

- Consultants
 - Bob Goforth, Bob Leak, Sr., and Mike Mullis
- Sr. Statewide Project Managers
 - Bruce Andrews, Peggy Anderson, Steve Brantley, Dallas Hardenbrook, and Martyn Johnson
- Vivian Powell, Project Manager, Research Triangle Region



Winning Proposals – Best Practices

- How Important is a Response on a Project?



How Important is a Response on a Project?

- Proposal submissions vary greatly
- Time and money committed to travel & functions versus proposals
- “YOU ONLY GET ONE SHOT AND YOU BETTER BE READY WHEN YOU GET THE OPPORTUNITY”

– Mike Mullis



Economic Development is not Rocket Science

- “THE BUSINESS WE ARE IN IS THE COMMON SENSE BUSINESS”
 - Bob Goforth
- First impressions are lasting impressions
- View your response from the recipients' perspective.
 - Is it complete?
 - Does it address the key questions / concerns?



Submission Top Priorities

- Be prepared. What is the backup plan during an absence?
- Data must be *accurate* and *current* (Goforth, Leak and Mullis)
- Focus on the basics – the emphasis should be on providing the appropriate information rather than something that looks good (Mike Mullis)



Submissions – User Friendly

1. There should be easy access to critical information
 - “YOU WANT YOUR PROPOSAL TO SURFACE TO THE TOP OF THE STACK”
 - Bob Leak, Sr.
2. Off the shelf materials don’t necessarily address the issue (Leak-Goforth)
3. Easy for client or consultant to duplicate for project team members



Submissions – User Friendly

4. Logical file names

- Project Name – County/Community/Organization – Type of File

5. Improve file transfer

- Zip files, PDF files, FTP Site



Submissions – User Friendly

6. Easy identification among other proposals and travel compatible, so the consultant / client can read the proposal when they travel
 - Not an oversized notebook
7. Use the consultant's format for RFP / RFI
 - Excel, Questionnaire, Matrix, etc.



Project Letter / Cover Letter

- A summary letter is needed with every submission – this is your opportunity to tell your story. It should:
 - Be addressed to project lead contact
 - Summarize the key points
 - Be aggressive and indicate that your organization is ready to do business
 - Provide the features & benefits of the building, site, community, organization or service that meet the needs of the client



Lead Contact

- Consultants / Brokers / Companies select a lead contact for a reason
 - Single initial contact
- Request that all follow-up questions & answers be shared



Future Direction

- Establish a resource workgroup for continuing development
 - Kenny McDonald, Donnie Hicks, Bob Leak, Jr. & Peggy Anderson
- Lets raise the bar in North Carolina to a higher standard at all levels:
 - Local
 - Regional
 - State
 - Allies

