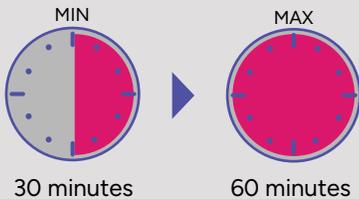




AUTHOR

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PURPOSE

to conduct an impartial review of a completed proposal before submitting to a competition

PARTICIPANTS

Impartial professionals who did not write or contribute to the proposal

EQUIPMENT

Interactive white board or Mural

ONLINE or LIVE

Both, one or the other

INDUSTRY

Any competitive pursuit for complex services

The following exercise supports a focused, final-stage review of a completed proposal referred to as a Red Team review. Red Teamers are people in the firm or wider industry who evaluate a proposal impartially from the client's perspective and provide high-impact, actionable feedback even when time is short.

A Red Team review is far more effective if you have done at least one review earlier in the pursuit process. Consider doing a Blue or Pink Team Review along with Red.

Red Team Review

an impartial review of the final draft of a competitive proposal

STEP 1 recruit the Red Team

Recruit impartial reviewers. Do this at least a week or two before the review session will take place so they can fit it into their schedules. Let them know how much time this will take. As a gesture of good will, offer to reciprocate on future submissions. The review of the proposal depends on the length of the document, but the review discussion itself should take no more than 60 minutes.

STEP 2 choose a collaborative medium

Either have the template printed on large paper, projected onto a white wall, or use it as a background in Mural or other online planning tool. To save time, organize this well before the session starts. A collaborative medium allows reviewers to see the input of other reviewers as it's being added, saves typing time during the session, (multiple people type their suggestions at once) and helps you keep a record of results.

FACILITATOR TOOLS: As the facilitator, you must be prepared to keep this exercise moving swiftly. Have the materials prepared ahead of time. Understand the tasks and templates before the session. Establish ground rules and budget time based on the suggested time intervals for each step.



STEP 3 prepare and send reviewer packages

Send the reviewers copies of the RFP, the final proposal document, and if they express interest in further items, the results of any win theme or storyboarding exercises you completed.

STEP 4 prime the proposal team

The worst thing a proposal writer can do during a review is get defensive about their writing or possessive of their ideas. This makes things awkward for the reviewers. They wonder what they're doing there, investing their valuable time. They inevitably conclude that you didn't really want help, but rather a pat on the back for a job well done. That's not the purpose of a review.

Prime the team before the review so they know that defensiveness and arguing are not cool. Even if the reviewers are merciless, hear them out. Take it like the professionals you are.

STEP 5 lead the review

A review exercise involves a group of reviewers offering their competitive assessment of the proposal document. You can help them by guiding that assessment. Twennie's Red Team Review template provides some suggested questions and a space for you to add questions specific to the opportunity.

One excellent way to complete this task is to encourage the reviewers to pretend they are scoring the proposal based on the evaluation criteria in the RFP. This makes it more likely that they will pinpoint highly strategic areas for improvement. If you go this route, provide the evaluation criteria in the review medium so they can see it while the review is underway.

STEP 6 collect and implement

Gather all feedback and keep a record of it. Implement as much of it as you can. You want to avoid your reviewers seeing the final version without their suggestions incorporated, because they will be reluctant to participate in future reviews. Send a thank you note to each reviewer with the final document attached and news of the results once they arrive.

suggested tool:



template

Red Team Review
Template



IF YOU ARE THE FACILITATOR

If your team is new to this exercise, the role of facilitator becomes critical.

Here are some tips from other facilitators who have led this exercise:

Help people arrive prepared; Too often, teams walk into a meeting not knowing what's expected of them. To prevent this, send out a preparation email in advance. This email should highlight key tasks completed during the exercise.

Maintain momentum; Whether you're leading peers or senior team members, remember: your role is to guide the process, not to make decisions. You're not the boss. You're the facilitator. That means keeping the discussion focused, fast-paced, and productive. If you're in the room physically, stay on your feet. Sitting—or worse, typing notes onto a projected screen—can slow things down and confuse your role. Recruit someone else to take notes so you can direct the conversation. At every moment, the team should know which step they're on and who's keeping them on track. The Twennie template helps you do this.

Keep everyone on task; facilitators must prevent the group from skipping ahead on steps. Steps are in the exercise for a reason, and unless you have deemed that reason irrelevant to the task, stick to the plan. Technical professionals want the exercise to be over quickly, so they may try to jump to the next thing. Hold the group to the process.

Watch the clock; The session should last no more than 60 minutes. Longer sessions lead to fatigue, wasted time. If you're using a tool like Mural (or another collaboration platform), but you're still in person in a boardroom, assign at least two note-takers. With multiple contributors placing sticky notes, the team can move more efficiently through the process.