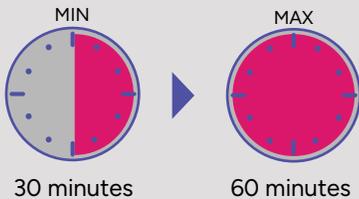




AUTHOR

Twennie Founders



PURPOSE

to support 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 template 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.

STEP 1

Download the Red Team Review exercise document. Plan the review based on the steps described.

STEP 2

This template is designed to support multiple approaches to this exercise. Conduct the exercise based on the steps described in the exercise document and then use this template in one of two ways:

- **Send it to the reviewers ahead of time and have them complete their review on their own schedules. Give them a deadline for sending it back. Make sure you give your team enough time to implement changes.**
- **Either hand out printed copies during the live exercise or project it onto a collaborative medium like Mural. Allow participants to add to the form live using Mural sticky notes.**

RED TEAM REVIEW

an impartial review of a completed proposal

RED TEAM

professionals who did not work on the proposal

FACILITATOR TOOLS: As the facilitator, you must recruit Red Team Reviewers. They should be a mix of people with industry experience and some idea of what goes into a good proposal. Give them plenty of notice. Explain what's expected of them. Send them a package containing the RFP, the proposal document, and the following template. You will also use this template during the review, so they don't need to fill it out on their own, if you've chosen that route. They can wait for the session.



DATE

PROPOSAL MANAGER

PROJECT

CLIENT

PROPOSAL DEADLINE

PROPOSAL TEAM

REVIEWERS

<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

DOCUMENTS INCLUDED



FINAL CHECKLIST

Does the proposal address the issues in the RFP?

Ensure the proposal address all key issues. When you find one in the document, place a check mark next to it on the RFP.

NOTES

Does the proposal show intimate and shrewd understanding of the client and the project beyond the RFP?

In other words, is the project mentioned frequently throughout the proposal, making specific references to key issues and your planned approach?

NOTES

Does the proposal tell a compelling story?

Check that risks have been identified and the client's fears at least "hinted at delicately." Then watch for a shift to a vision of success. Does the proposal describe the project's past, present, and desired future in a way that makes your team the obvious fit to deliver it?

NOTES



Does the proposal highlight your planned methods, tools, technologies, and specialists?

These should appear in all sections in some form. Are all the project issues covered by these “features”? In other words, are features of the offer uniquely applicable to this project? The benefits of these features, are they clearly articulated?

NOTES

Does the proposal contain a full solution, AKA a set of services the client can count on for all aspects of the work? Does it address all items listed in the RFP and more?

Quantify value: does the client get meaningful benchmarks—are they able to compare the work experience to their project in terms of scale, complexity, or results? Does the proposal show that you’re not just a capable option, but the best-fit solution?

NOTES

When you read the proposal, try replacing your firm’s name with the name of a competitor. Are the statements still true? If so, you haven’t provided enough specific detail on what makes your offer unique.

NOTES



USE THIS PAGE TO SHOW THE EVALUATION CRITERIA FROM THE RFP

CRITERIA SCORE 1

Name the criteria category here

<input type="checkbox"/>					
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CRITERIA SCORE 2

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CRITERIA SCORE 3

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CRITERIA SCORE 4

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CRITERIA SCORE 5

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CRITERIA SCORE 6

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