twennie

# pre-RFP business development planning template

**Twennie Team Name:**

**Team members:**

## STEP 1 choose a medium

Either have this template printed on large paper, projected on a white wall, or use it as a background in Mural or other online planning tool

## STEP 2 hold a session or series of sessions

Print the Pre-RFP Strategy Task Cards or create notes containing the content of the cards. Simply copy and paste from the Twennie template to the online medium.

- Name of Team Member Leading the Charge
- Added Tasks
- Terminology
- Tools and Technology
- Planned Learning
- Events (Internal or External)
- Next Steps
- Time Stamps - How Much Will We Spend, Where and Job Numbers

Culture and Awareness Tasks

Tracking Cards

Pull Marketing Cards

*Highly Strategic*

*Level 2*

*Level 3*

Accountability

Recognition

Competency

## STEP 3 add tasks

Choose from the task cards the ones you want to implement. If you have others, add those using pink notes.

## STEP 4 decide on learning

Decide what new skills and knowledge your team will develop. Suggestions can be found on the task cards. Use orange notes for additional learning.

## STEP 5 decide on terms, technology, next steps

Decide on at least three key terms you will use to describe pre-RFP BD activities. Use peach, taupe and purple notes.

## STEP 6 decide events, social media

Decide what you'll post, where and when.

Decide on at least three events you'll do in pursuit of major opportunities.

## STEP 7 create accountability

Decide who is accountable for each task, when. Try to spread this accountability so the managers aren't doing it all. Use black notes for names.

## STEP 8 budget time

Use green notes to put caps on all identified activities. Choose job numbers, if necessary. Consider breaking up opportunities into categories of investment. For the most strategic opportunities, plan a full schedule. Choose two further categories for smaller opportunities and create a plan for each with budgeting.

## STEP fun add at least one fun thing

All the task cards suggest fun ways to complete these tasks. Choose at least one or create your own. Adding fun to tasks is an excellent way to engage people and help them be more creative.

Internal fun can energize the team. Fun with the clients can make you stand out in the crowd as a team that is more fun to work with. Consider choosing one fun activity for the team and one for clients, as a minimum.