Positive Impact!
Transforming Feedback into Continuous Improvement

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NEW ORLEANS
APMP BID & PROPOSAL CON
JUNE 13-15, 2017
Post Mortem – Internal Process I – Simple Survey

IGT Business Proposals Post Mortem Questionnaire

Proposal Name:
Due Date:
Bill Manager:
Lead Editor:
Lead Designer:
Production Manager:
Production Coordinator:

A. Please describe two things that were positive about this project.
   1. **Sample**: Account Team members were onsite during reviews.

B. Please describe two things that could have been improved upon regarding this project.
   1. **Sample**: Some requirements were difficult to interpret due to translation.

<table>
<thead>
<tr>
<th>Jurisdiction:</th>
<th>Questionnaire Results - Positive</th>
<th>Notes</th>
<th>Suggested Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Sample</strong>: Account Team members came to Providence for review</td>
<td>The writers found it easier to get questions answered quickly.</td>
<td>Determine if there is budget available for international teams to travel to Providence for reviews or overall proposal support on upcoming RFPs.</td>
</tr>
<tr>
<td>2</td>
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<tr>
<td>10</td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Questionnaire Results - Improvements</th>
<th>Notes</th>
<th>Suggested Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Sample</strong>: Some requirements were difficult to interpret due to translation.</td>
<td>It took a lot longer to answer requirements because account team had to re-read the translation.</td>
</tr>
</tbody>
</table>
Internal Post Mortem Survey - 2

Project Name:
Due Date:
Proposal Manager(s):
Lead Editor:
Lead Designer:
Lead Desktop Publisher:
ADM:

Instructions
Please describe (in concise, neutral [use titles, not proper names] language) two positive and two negative circumstances about the [jurisdiction] project in the tables on the following page. To help with completing the tables, please consider the following:

1. Are the project’s deliverables exceptional, satisfactory, or subpar?
2. What were the most gratifying and frustrating parts of the project?
3. Did team members participate effectively?
4. Which of our processes did and did not work well?
5. If you could change anything about the project, what would you change?

Please include your four most important items in the survey. Please return completed surveys to [name] by [date].

Sample Positive Response:

<table>
<thead>
<tr>
<th>Circumstance</th>
<th>Contributing Factor</th>
<th>Result</th>
<th>Possible Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample: The Account Team supplied procurement information early in the process.</td>
<td>The Account Team prepared for the bid well in advance of RFP issue.</td>
<td>We had the information we needed to provide a high quality response.</td>
<td>Share this finding with the Account Team, their managers, and salesforce.com leadership. Continue to work with salesforce.com leadership to make bid preparation a priority.</td>
</tr>
</tbody>
</table>

Sample Negative Response:

<table>
<thead>
<tr>
<th>Circumstance</th>
<th>Contributing Factor</th>
<th>Result</th>
<th>Possible Action / Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample: The Account Team missed 2 conference calls regarding the executive summary.</td>
<td>The Account Team seemed to be waiting until the last minute to work on this document.</td>
<td>The writer and Account Team had to significantly shorten the Executive Summary.</td>
<td>Writers could escalate this kind of issue to Proposal Managers who could escalate to the Senior Director. Depending on the schedule, pull the executive summary since it’s not scored. Proposal Managers could use this circumstance as an example of a problem and its potential outcome when discussing the schedule and deadlines with the Account Team.</td>
</tr>
</tbody>
</table>
Sample: Post Mortem Meeting Results Table –

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Due Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal manager (s):</td>
<td>Lead Editor:</td>
</tr>
<tr>
<td>Lead Designer:</td>
<td></td>
</tr>
<tr>
<td>Lead Desktop Publisher:</td>
<td></td>
</tr>
<tr>
<td>ADM:</td>
<td></td>
</tr>
<tr>
<td>Post Mortem Editor:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Circumstance/Comments</th>
<th>Possible Action / Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Management</td>
<td>Team members had prior proposal experience.</td>
</tr>
<tr>
<td></td>
<td>Proposal managers need to communicate when changes are made. Proposal managers must also make clear which resource is to read what so that on resource’s comments are not changed because another resource came on in the middle.</td>
</tr>
<tr>
<td>Proposal Management</td>
<td>Two managers great. Consider having two managers on all major bids, or at least have a backup manager. Number of proposal managers might not allow two on each bid – who could back up?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Writing/Graphics/Compliance</th>
<th>Brain dump can be too much. Find way to work more closely with the Account Team to determine which items and messages are most important.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Production</th>
<th>Determine what needs will be beforehand. Production is currently working on a best practices document for production overseas.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Collaboration, Communication and Teamwork</th>
<th>Lack of clarity in roles, with non-technical resources for non-technical sections. Provide clear overview and definition of roles up-front.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Other</th>
<th>The complexity of the RFP and the work required to get it done were underestimated.</th>
</tr>
</thead>
</table>
Post Mortem – Internal Process III – Structured Process

Internal Proposal Project Post Mortem

Post Mortem Process:

1. Within ten days of project completion, the Bid Manager contacts the Mediator about conducting a Project Post Mortem.

2. The Mediator sends Post Mortem Surveys (the Survey[s]) to Project Participants for completion.

3. The Mediator chooses the Core Team (the Team) (from a rotation) and a Scribe (from members of the selected Team – also on a rotating basis) and schedules the Post Mortem Meeting (the Meeting), adding the Bid Manager if not already a member of the selected Core Team.

4. The Mediator records the Team and Scribe choices to maintain the rotations.

5. The Project Participants complete the Surveys and place them on the InProg server in the corresponding project folder’s Post Mortem folder. Non-proposals staff members email their completed Surveys to the Scribe.

6. The Scribe organizes the Survey responses in the Post Mortem Survey and Meeting Results Table (the Table).

7. The Editor (each Team has one) edits the Table and sends it to the Mediator.

8. The Mediator reviews the Table and distributes it to the Team.

9. The Team reviews the Table and brings a copy to the Meeting.

10. The Mediator leads the Meeting.

11. The Team recognizes positive outcomes and identifies solutions to any negative results.

12. The Scribe records and organizes the Meeting results in the Table.

13. The Editor edits the Table.

14. The Mediator reviews the Table and creates a Post Mortem Summary Report (the Report), posts both documents in Documentum, and distributes links to Project Participants.

15. Project Participants review the Report and the Table.

16. Project Participants adhere to resulting policies and processes going forward.

17. The Proposals Management Team monitors and reinforces resulting policies and processes going forward.
Glossary:

- **Project Post Mortem**: A process for analyzing a project’s positive and negative aspects, acknowledging positive outcomes, and establishing improvements.

- **Post Mortem Survey (the Survey)**: A survey on a project’s positive and negative aspects.

- **Post Mortem Meeting (the Meeting)**: A meeting to recognize positive outcomes and identify solutions to any negative results as listed in Project Participants’ Post Mortem Survey responses.

- **Post Mortem Survey and Meeting Results Table (the Table)**: A table listing the Post Mortem Survey and Post Mortem Meeting Results.

- **Post Mortem Summary Report (the Report)**: A summary of the Table.

- **Project Participants (Note: Includes as Close to the Entire Team as Possible) and Corresponding Responsibilities (Note: All Project Participants Complete the Survey and Review the Table and Report.)**:
  - The Mediator: Manages Post Mortems (see process above for details).
  - The Core Team: Participates in the Meeting.
  - The Scribe (a Core Team Member): Organizes the Survey responses, participates in the Meeting, records the Meeting results in the Table.
  - The Bid Manager (always Core Team Member on Post Mortems for His/Her Bids): Initiates a Project Post Mortem for his/her bid scheduling milestones with, and supplying Project Participants’ names to the Mediator.
  - The Editor (a Core Team Member): Edits the Table.
  - Proposals Management Team: Monitors and reinforces policies and processes resulting from Project Post Mortems.
Post Mortem Procedures

Within 10 days of a project’s completion, the Project Manager will initiate the Post Mortem process by performing the following steps:

1. Choose a Mediator. (The Mediator should be chosen from the Mediator and Scribe List, which is located in Documentum in the Post Mortem Archive folder.)

2. The Mediator sends out the Post Mortem Questionnaires to all people involved in the project and asks for them to be returned by a specific date. The Mediator should also send friendly reminders. (The Post Mortem Questionnaires are located in Documentum in the Post Mortem Archive folder.)

3. The Mediator will then use the questionnaires to fill in the fields of the template – Post Mortem Grid. (Located in Documentum in the Post Mortem Archive folder.)

4. The Mediator will then save the Post Mortem Grid into Documentum with the title so it can be used by other participants later on in the process.

5. The Mediator then determines the need for a Long Form or Short Form Post-Mortem:

   **Long Form Post Mortem**
   
   If the Post Mortem Grid reflects issues that have not been brought up in the previous Post Mortem Meetings, the Mediator will schedule a Post Mortem Meeting to discuss these issues. Attendees will include: the Proposal Manager, Lead Editor, Lead Document Publishing person, Production Coordinator, and Traffic Coordinator. Mediator will also need to choose a Scribe for this meeting. (List is located in Documentum.)

   Reasons to proceed to a Long Form Post Mortem Meeting include:
   - Issues that have not already been discussed at previous Post Mortem Meetings. (Looking back at previous Post Mortem Grids should reflect such repeat issues.)
   - Repeat issues that are not being actively resolved.
   - If the Mediator is unsure if a particular issue should trigger a Post Mortem Meeting, he/she should ask for the opinion of the person that listed the issue.

   **Short Form Post Mortem**
   
   If the Mediator determines the Short Form Post-Mortem can be utilized for the project, a Scribe is not necessary. Also, the Post Mortem Meeting, which includes the discussion of topics in the Post Mortem Grid, is unnecessary. Proceed directly to Step 8 below.

6. **Long Form Post Mortem Meeting**:

   - At the meeting, the Mediator will distribute and read the issues listed in the Post Mortem Grid.
   - After each problem/issue is presented to the group, possible solutions will be discussed. It is important to focus on discussing possible solutions.
   - The Mediator will be responsible for moving the meeting along.
   - The Scribe will take notes on topics discussed during the meeting and all suggested solutions.

7. After the Post Mortem Meeting, the Scribe will update the “Meeting Notes” field in the Post Mortem Grid. The Scribe should also have an editor look over the Post Mortem Grid.

8. The Mediator will then schedule a Manager’s Meeting.

   **Long Form Meeting**
   
   Attendees of this Manager’s Meeting will include: Mediator, Scribe, Business Proposal Director, Renee Steele, Tom Malloy, Judy DiCenzo, Ron Coyne, and all attendees of the original Post Mortem Meeting.

   **Short Form Meeting**
   
   Attendees of this Manager’s Meeting will include: the Mediator, Business Proposal Director, Renee Steele, Tom Malloy, Judy DiCenzo, Ron Coyne, Proposal Manager, Lead Editor, Lead Document Publishing person, Traffic Coordinator, and Production Coordinator. (The Mediator will scribe the meeting in this case.)

9. **Manager’s Meeting**:

   - The Mediator will present the issues from the Post Mortem Grid.
   - Issues will be discussed and actions/solutions will be suggested.

10. A Manager’s Grid of Post Mortem results (including actions, person responsible, due date) will be put into Documentum and updated.
Example of Initial Lessons Learned Process

1. Send submission notification
2. Consolidate all internal feedback and send to BP Mgmt
3. Hold LL meeting (with a key focus on actions to resolve issues)
4. Quarterly meeting with management to discuss how to improve the LL process

+ 1 Week + 2 Weeks + 3 Weeks + 4 Weeks

Quarterly

NB: Timeline is from proposal submission

Example of Initial Lessons Learned Survey

1. How would you rate the overall performance of the Bid Team on this proposal project (this includes ALL stakeholders involved):

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poor</td>
<td>Good</td>
<td>Neutral</td>
<td>Satisfied</td>
<td>Outstanding</td>
</tr>
</tbody>
</table>

2. How would you rate each of the following proposal project processes:
   - Capture Planning & Support
   - Kick-Off
   - Storyboarding/Planning & Outlining
   - Writing & Editing
   - Graphics & Design
   - Account Team Review
   - Red Team Review
   - Production

   Please provide any additional comments or feedback related to your scores:

3. What are the top 3 – 5 processes/practices that went well and should influence future proposals:
   1. Daily status meetings worked well
   2. 
   3. 
   4. 
   5. 

4. What are the top 3 – 5 things that we need to improve for future proposal projects:
   [as above]
Lessons Learned – Revised Survey

1. What bid does your feedback relate to?

2. What functional area of the company are you from (ex. Business Proposals, Finance, Legal, etc.)?

3. Please select which category(ies) you are leaving feedback for and then write your feedback in the box below (Note: You may either make one entry per category, OR you may select multiple categories for one feedback entry).

- [ ] Capture
- [ ] Kick-Off
- [x] Storyboarding
- [ ] Writing
- [ ] Editing
- [ ] Translation
- [ ] Design/Formatting
- [ ] Account Team Reviews/Performance
- [ ] Publishing/Printing
- [ ] Page Check
- [ ] Submission/Delivery
- [ ] Other

Other (please specify)

4. When logging feedback, please keep the following questions in mind:

- What went well during bid that we should we KEEP doing?
- What should we IMPROVE to make the bid cycle better?
- What should we START doing on the next bid to be better?
- What should we STOP doing on the next bid to be better?
### Lessons Learned – Master Actions Log

<table>
<thead>
<tr>
<th>Action Number</th>
<th>Priority Level</th>
<th>Source</th>
<th>Process Category</th>
<th>Detailed Description</th>
<th>Action</th>
<th>Owner</th>
<th>Target Date for Completion</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>HIGH</td>
<td>Lessons Learned</td>
<td>Kick-Off</td>
<td>Update kickoff decks to include...</td>
<td>Update Process Documentation</td>
<td></td>
<td>OPEN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>MEDIUM</td>
<td>Lessons Learned</td>
<td>Other</td>
<td>Schedule 30-minute BP Overview check-in with VP and team</td>
<td>Educational Workshop</td>
<td></td>
<td>OPEN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>LOW</td>
<td>Lessons Learned</td>
<td>Other</td>
<td>Determine how we can leverage...</td>
<td>Bid Planning Session</td>
<td></td>
<td>OPEN</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Lessons Learned – Master Feedback Database

<table>
<thead>
<tr>
<th>Domestic/International</th>
<th>Bid Type</th>
<th>Incumbent?</th>
<th>Survey/Name Internal/External</th>
<th>Comments</th>
<th>Department</th>
<th>Additional Feedback Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>Lottery</td>
<td>Yes</td>
<td>Jurisdiction No/Yes/External</td>
<td>We had a good understanding of this customer and were able to identify what we thought the overarching strategy should be. I am unsure in this question who you refer to when you say bid team. We had the proposals group, the account team - so what is the bid team?</td>
<td>NULL</td>
<td>NULL</td>
</tr>
</tbody>
</table>