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Track 2: Navigating the Procurement Process Like a Pro

Session B: Best Practices for a Competitive Proposal

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Build the Proposal: Five Core Practices

1. Follow the solicitation and evaluation criteria
   - Create a compliance matrix or checklist
   - Organize the proposal
   - Monitor addenda and submit questions
   - Attend pre-proposal meetings and use vendor Q&A period to clarify requirements

Build the Proposal: Five Core Practices

2. Demonstrate relevant experience with evidence
   - Select project examples that match the scope, size complexity, or risks identified in solicitation
   - Explain what your firm did, how it performed, and the measurable result
   - Use past project examples that demonstrate evidence of work performed

Build the Proposal: Five Core Practices

3. Explain your approach and value
   - Describe how the work will be performed
   - Connect your approach to the agency's needs
   - Review how price and non-price factors will be evaluated in the solicitation

Build the Proposal: Five Core Practices

4. Present a qualified team with the capacity to perform
   - Provide a clear organizational chart with reporting structures
   - Demonstrate that the individuals presented in the proposal possess the relevant experience
   - Demonstrate that systems, equipment, and partner resources are sufficient for the proposed work

Build the Proposal: Five Core Practices

5. Review your proposal for compliance and quality before submission
   - Use a final compliance review
   - Verify page limits, files names, forms, attachments, etc.
   - Submit proposal before the deadline

Build the Proposal: Key Takeaway

- Make it easy for evaluators to understand how the proposal meets the stated requirements and evaluation criteria

Preparing for the Interview

- Be prepared to reiterate key elements of the proposal
- Include proposed team members who can clearly explain their roles and how they will deliver the work
- Assign roles and rehearse
- Answer fully and directly
- Demonstrate delivery capacity

Preparing for the Interview: Key Takeaway

- Treat the interview or oral evaluation as part of the evaluation process, not as a formality

Learning from the Outcome

- Review your proposal again
- Ask whether a vendor debrief or other post-award feedback process is available
- When feedback is available, ask where the response was strong, where it was less competitive
- Document lessons learned and assign specific improvements

Learning from the Outcome: Key Takeaway

- Always learn and improve
- If an opportunity does not result in an award, use the procurement experience to learn and strengthen your future approach

Summary of Key Takeaways

1. Be strategic. Pursue opportunities where you can realistically compete and perform
2. Respond to the evaluation criteria. Make it easy for evaluators to understand how your proposal meets the requirements
3. Learn and improve

Resources, Audience Q&A & Closing

Scan the QR code below to book 1-on-1 appointment with SCORE, SBDC, and PACE Business available today from 1-3pm

Scan the QR code below to find a mentor at Verge Mentors