



Optimetra's Model for Proposal Success

*Working with you
to get results*

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Introduction



- Focus exclusively on healthcare industry
- 13+ years proposal experience in:
 - ❖ Medicaid
 - ❖ Medicare
 - ❖ TRICARE
 - ❖ Commercial
- Model developed from that experience
- Transferable to other industries





Characteristics of Model



- **Diverse:** draws on techniques from multiple disciplines
 - ❖ Proposal development
 - ❖ Project management
 - ❖ Technical publishing
 - ❖ Software engineering
- **Pragmatic:** what works, what does not
- **Contrarian:** embraces conflict; does not avoid it
- **Relationship-oriented:** use tools and artifacts to promote the discussion, not subvert it





Objectives of Model



- Win contracts that match strategic objectives
- Create systematic set of processes, tools, and artifacts for future use
- Leverage learning from multiple disciplines
- Reuse best practices gained from experience

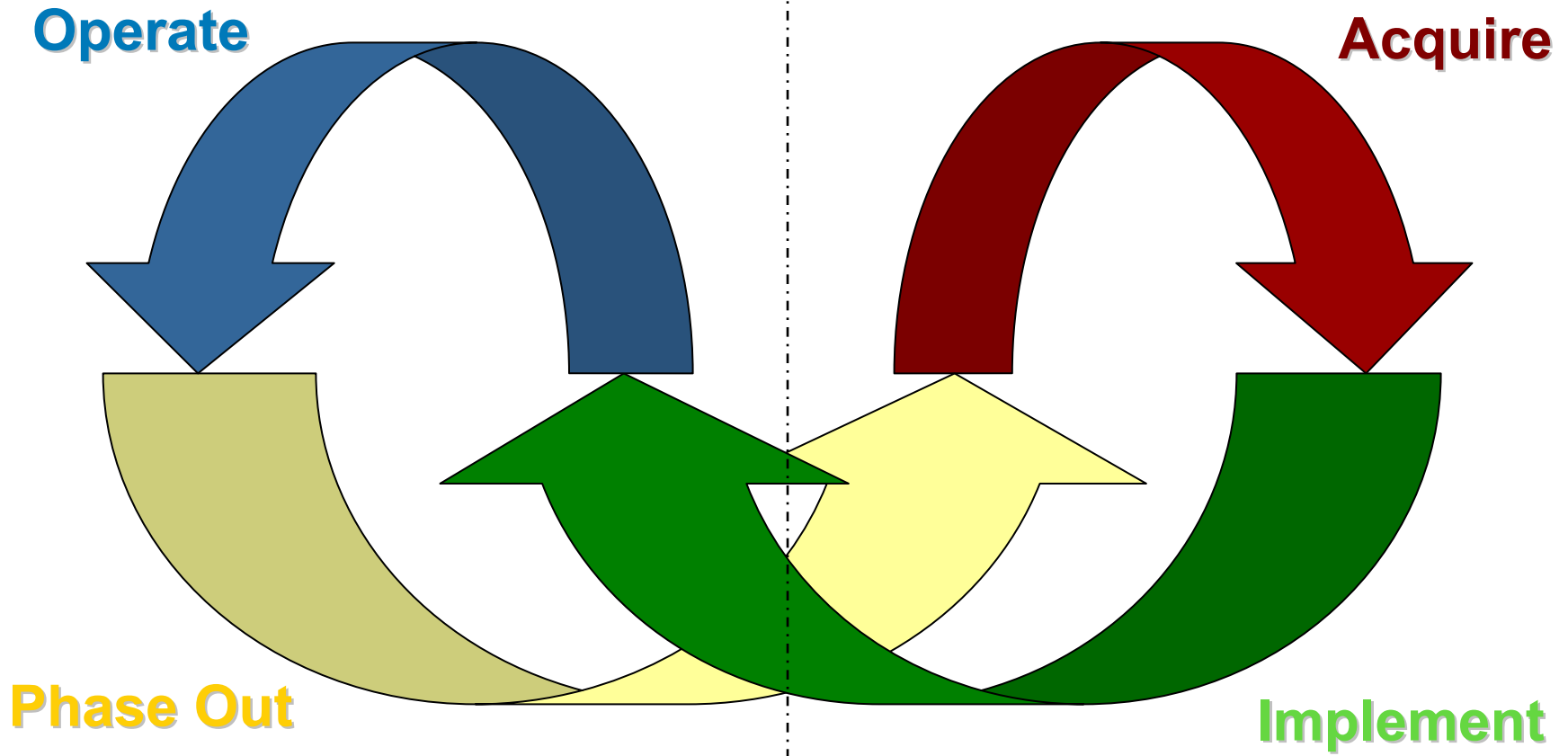




Business Life Cycle



Optimetra Focus Areas





Business Development Cycle



Acquire

- ❖ Opportunity Identification
- ❖ Pre-sales
- ❖ Strategic Positioning
- ❖ Proposal Development



Implement

- ❖ Project Management
- ❖ Process Improvement
- ❖ Training
- ❖ Provider Communications

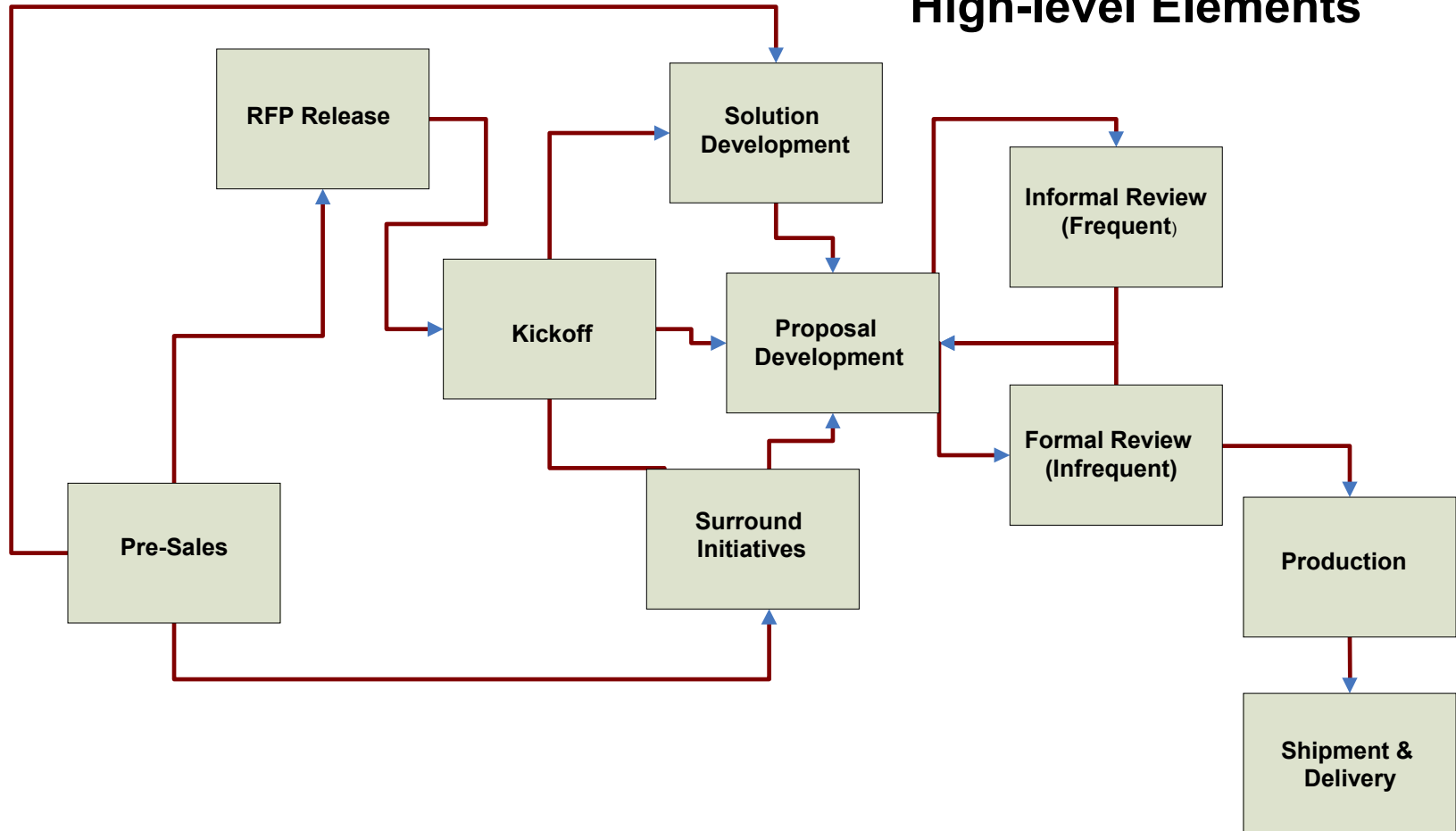




Optimetra Proposal Model



High-level Elements





Pre-RFP



Activities

- ✓ Opportunity Analysis
- ✓ RFI Response
- ✓ White Papers
- ✓ Pre-Sales
- ✓ Lobbying Efforts

Artifacts

-  Business Case
-  RFI Response
-  White Paper
-  RFP Pre-work Documents





RFP Release



Activities	Tools	Artifacts
<ul style="list-style-type: none">✓ RFP Analysis✓ Bid/No-Bid Decision✓ Competitive Analysis✓ Environmental Research	<ul style="list-style-type: none">➔ Business Case➔ Category-Based RFP Analysis	<ul style="list-style-type: none">📄 Category-Based RFP Analysis Results📄 Bid/No-Bid Analysis📄 Bid/No-Bid Presentation



Proposal Kickoff



Activities

- ☑ Proposal Planning

Tools

- ➡ Proposal Management Toolkit

Artifacts

- 📄 WBS/Schedule
- 📄 Risk Management Plan
- 📄 Resource Matrix & Org Chart
- 📄 Outline/Assignments
- 📄 Compliance Matrix
- 📄 Issue Log (initiated)
- 📄 Kickoff Agenda
- 📄 Kickoff Presentation
- 📄 Differentiators/Win Themes
- 📄 Style Guide
- 📄 Information Design





Solution Development







Activities	Tools	Artifacts
<p>✓ Solution Component Definition</p> <ul style="list-style-type: none">✗ People✗ Processes✗ Performance✗ Projects✗ Technology	<p>➔ Solution Development Toolkit</p>	<p>📄 Solution Matrix</p>





Proposal Development



Activities	Tools	Artifacts
<ul style="list-style-type: none"><input checked="" type="checkbox"/> Research<input checked="" type="checkbox"/> Writing<input checked="" type="checkbox"/> Graphics Development<input checked="" type="checkbox"/> Iterative Reviews<input checked="" type="checkbox"/> Status Meetings	<ul style="list-style-type: none"> SME Interview Toolkit	<ul style="list-style-type: none"> Interim Drafts SME Questionnaires Status Reports



Surround Initiatives



Activities	Tools	Artifacts
<ul style="list-style-type: none">✓ R&D e.g. Provider Network Development, Program Design✓ Operational Initiatives e.g. Corrective Action Plans	<ul style="list-style-type: none">➔ Project Management Methods	<ul style="list-style-type: none">📄 Contributions to Solution📄 Contributions to Proposal Content📄 Corrective Action Plans



Informal Review



Activities

Review by SME

Artifacts

 Marked-up document





Formal Review



Activities	Tools	Artifacts
<ul style="list-style-type: none">✓ Full Edit✓ Formatting✓ Review (multiple level)✓ Post-Review Structured Walkthrough	<p>➔ Editing Toolkit</p>	<ul style="list-style-type: none">📄 1st Draft Proposal📄 Structured Walkthrough Action Lists📄 Proposal Plan Revisions📄 Differentiators/Win Theme Revisions📄 Final Solution Model (frozen)



Production



Activities	Tools	Artifacts
<ul style="list-style-type: none"><input checked="" type="checkbox"/> Printing<input checked="" type="checkbox"/> Collation<input checked="" type="checkbox"/> Assembly<input checked="" type="checkbox"/> QA	<p>➔ Assembly Instructions</p>	<p>📄 Production Copies</p>



Shipment & Delivery



Activities

- Packaging
- Transfer to Carrier
- Destination Verification





Changes in Course



- May require a return to earlier parts of proposal development cycle
 - ❖ New technology
 - ❖ New environmental or competitive discoveries (obtained through ethical means!)
 - ❖ Significant changes to RFP
- Revise proposal plan as appropriate
- No-bid when appropriate
- Be willing to throw things away





Questions?





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