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White Paper:

Why It's Time to Evolve Beyond the Red Team

Introduction

In October of 2006, I presented on the topic of "Why Your Red Team is Broken and What To Do About It" at a conference in Atlanta, Georgia hosted by the Association of Proposal Management Professionals. I submitted the slides weeks before the presentation. But the more I thought about it, the more I became convinced that new approaches are needed to improve proposal quality. When I gave the presentation, I asked the audience if anyone felt their proposal Red Team reviews were consistently effective. **No one raised their hands.** I was expecting to get at least a couple.

As I spoke, I realized that the way we review proposals today is not very different from the way we did it 20 years ago when my career was just getting started. **If in that time, no one in the entire industry has ever come up with an approach that is consistently effective, then there is something inherently wrong with the way we approach proposal reviews.**

When I returned, I published a series of articles and comments in the CapturePlanning.com newsletter, which has a circulation of

If, like most of the people we've discussed this topic with, you are open to leaving "Red Teams" behind and moving on to something that actually works, you may skip ahead to where we talk about what should replace them. The beginning of this white paper drives home all the reasons why this move is necessary, in order to convince those who are reluctant to change.

more than 40,000 people involved in business development and proposal writing. Again, no one stepped up to say that the Red Team approach was successful for them. The feedback I got from the newsletter was a series of emails from people pointing out the problems they have with their Red Teams.

As I've thought more about it, I've come to realize that it's time to throw out the Red Team and come up with something new. **It's not something that we can make a little better each time until it works.** It was a good first attempt, but if it hasn't been made to work in 20 years, it's not going to work. Little by little, it's going nowhere. It's time to evolve past the Red Team and replace it with something that does work.

Why the Red Team is Broken



The scope is not well defined. Most Red Teams try to review: capture strategies, the proposal outline, production quality, compliance, accuracy, effectiveness of the approach, persuasiveness of the writing, completeness of the document, how you stack up against the evaluation criteria, implementation of win themes, and incorporation of customer/solution/competitive awareness. Is it any wonder they finish feeling incomplete? Or that when you have a meeting with a mandate so broad that you have trouble focusing their attention?

Now, try removing items from the list above and see how far you get before you delete something vital.

Participants do not add value. Red Teams do not help people win. It's not even part of the charter for most Red Teams. They are typically positioned as a quality control function whose job it is to find problems. They play little or no role in preventing problems, resolving problems, or in helping the proposal team to win. The best you can hope for is some helpful suggestions on how to fix something that you already know has problems.

There is no good time to have a Red Team. You can have your Red Team too early, or you can have it too late. If you have it too early, you are asking people to review a document that is incomplete and different from what the customer will see. If you do it too late, the document will be more mature, but you will be out of time to make any changes. This is why people add “pink team” reviews, or have follow-up Redder-Than-Red Team reviews. Neither approach works. The problem is inherent in the design and due to a scope that is so broad it contains requirements that conflict and are impossible to implement. Adding colors will not solve the problem.

Inexperience and lack of training. The Red Team concept relies on highly experienced staff to advise the proposal team. However, these people are rarely available. And when they are, they usually can’t dedicate the time that a good review requires. It is not realistic to expect senior staff to be available to participate in an unlimited scoped review of every proposal a company produces. The concept is flawed. A reengineered solution should make better use of mid-level staff (since that’s who populate most Red Teams anyway) and limit the use of senior staff to where they are most effective.

Lack of purpose. Most Red Teams are hunting expeditions where reviewers see what they can find. Red Teams like this do not produce results on purpose — they produce them by chance. Proposals should be purpose-driven documents that are validated explicitly and intentionally.

Lack of leadership. Who oversees the Red Team, holds them accountable, calls them to order, instructs them in their mission, and teaches them how to do their job? Does that person have the authority to direct the “gray beards” selected to participate? Usually it defaults to the Proposal Manager to direct the Red Team. Leadership by default is not a best practice. Every step in an effective workflow must have oversight, accountability, guidance, and training. This is the role of a leader. To be effective, every review must have one.



It's not just the Red Team – all Color Teams have the same problem



People have tried to overcome the limitations of the Red Team by inventing a host of other “Color Teams.” A pre-writing strategy review might be called a “Pink Team.” A formal draft review is typically called a “Red Team.” Pricing reviews are “Green Teams.” Final reviews are “Gold Teams.” Some companies have Blue Teams, Purple Teams, and occasionally other colors. Color team labels mean so many things to different people that they have become meaningless. This is because the scope is not well defined for any of the color team labels.

- Is the Pink Team review an outline review, win theme review, capture strategy review, storyboard review, production plan review, or all of the above? There is no formal mechanism to validate that what is shown at Pink Team actually makes it into the document (Pink Teams and Red Teams are almost always conducted independently).
- Is there only one Green Team or does there need to be more than one pricing review? How do pricing reviews, technical solution development, and proposal text get reconciled? How does this reconciliation get validated?
- There is no integration between Color Team reviews. They are conducted independently. Future reviews do not validate against prior reviews. They don't reinforce or add up to anything. Each review re-invents the wheel. Reviews often revisit difficult issues, contribute to indecision, and consequently make drastic last minute changes more likely. This is the exact opposite of what is needed.

- What is the scope of the Gold Team review? Is it strictly a validation that the document has been produced and assembled accurately, or is it a final chance to change strategies and message? The endless conflict that erupts at this stage results directly from acceptance of the inadequate color team model.

What exactly is a "red team?" Ask 20 people and you'll get 20 answers (if not more). Then ask them what a "blue team" or a "pink team" is and you'll get even more varied answers. People have so many goals for their color teams that can't agree on which goals apply at any given time. The result is that most color teams do not achieve any goals. And while I am sure that *you*, gentle reader, know what a Red Team, a Pink Team and a Blue Team are supposed to be, it doesn't do any good unless all of the stakeholders share a common set of expectations.

While it may be possible to narrowly define a set of reviews and give them color labels, you cannot implement this consistently or effectively across an organization:

- You cannot take a poorly scoped review and make it better by having more of them.
- If the Red Team review does not add value, then having more colors will not either.
- The Color Team model is based on problem detection and not on helping to win or adding value.
- When is the right time for a color? The Color Team model imposes sequential milestones on a process that is not sequential.
- If experienced and trained reviews aren't available for the Red Team, how do you think you are going to get them for the other colors?
- How does a color translate into a purpose driven act?
- Reviews should focus on what needs to be validated, not on the state of the document at a moment in time.
- Most Color Teams practice leadership by default. The result is usually a lack of leadership. This means the review team is not accountable, directed, or trained.

A little story about the Red Team that couldn't

I recently watched while a billion dollar company blew a must-win proposal.

They had a Pink Team and found problems. They had a Red Team that found so many problems, that they had a follow-up Redder-than-Red Team review. At each review the proposal got a little better, but it never got good enough to win. They had to be satisfied with submitting something that was (barely) RFP compliant.

They had their reviews. What they didn't do was validate specific items such as the outline and their strategies.

It's too easy to fail a review and go on to the next when the colors are defined by milestones. But it's a lot harder to hide behind other issues when specific items, such as an outline, have failed their validation and remain un-validated.

What we really need...

- Well defined review scopes that validate specific items
- A methodology that defines the review requirements according to the needs of each particular business and proposal
- An approach that incorporates guidance for review team members
- Approaches for conducting reviews that better fit what circumstances require
- Less impact on proposal workflow — reviews that can be conducted without freezing the baseline or requiring a wasted production cycle
- A way to determine what level of review is sufficient
- Traceability from issue through validation
- Quality assurance and quality control (they are two different things)
- Reviews that add value
- Reviews that help the proposal win

Why the Color Team Model Can't Be Fixed

The problems run far deeper than the lack of guidance that color team labels provide us with. The real problem is the lack of purpose and guidance in the color team model. The color team model does not add up to a completely validated proposal, because it was not designed to do that. Color team reviews were designed around a sequence of milestones. **The reason they cannot be made to work is that you cannot define the scope of the reviews in such a way that they meet the need of the proposal for validation.**

People have been unwilling to get rid of color teams because the need for quality proposals is supreme, and an ineffective attempt at it is perceived as better than no attempt. **Is this the best that the industry can come up with? We can throw out the "red team" but keep the goals. Indeed, we must throw out the Red Team in order to achieve the goals.**

The Red Team review in particular, and color team reviews in general, were created with good intentions. But they fail in implementation. If Red Teams are good in principle but can't be implemented effectively in practice, then I question whether they are any good. **Without positive results after 20 years, Red Teams certainly can no longer be considered a best practice.** Does it make sense for the entire industry to accept a process that no one can implement with consistent success? In spite of the good intentions, and in spite of the need, color team proposal reviews are a waste of time and resources. Even with Color Teams, the need for proposal validation is going un-met. It's time to drop Color Teams and replace them with some real validation. Call it evolution.

Thanks for getting us this far

Many organizations have evolved to the point where it is universally accepted that every proposal should have a Red Team. This is progress. There was a time when organizations did proposals without a process to ensure quality. Today, it's a safe bet that if the Proposal Manager doesn't mention it, someone will ask "When will we have the Red Team?"

As an industry, we have trained people to expect a "Red Team" as a means to ensure quality. **This was a good first step. Now we need to teach them that a "Red Team" is not a total solution for proposal quality.** In fact, "Red Teams" get in the way of quality proposals. It's time to learn how to validate our proposals correctly, using a methodology that can be successfully implemented.

The Purpose-Driven Proposal

If you want to take your organization to the next level, instead of dumbing down by using Color Team labels, educate people in what it means to validate a proposal. Instead of lumping everything into a "Red Team" or trying to solve your scope problem by adding colors, validate specific items such as:

- The capture plan and proposal readiness (pre-RFP)
- The outline and content plan
- The validation plan and production plan
- Win themes and strategies
- Compliance
- Accuracy (proofreading and assembly)
- Effectiveness of the approach
- Pricing
- Persuasiveness of the writing
- Completeness of the document
- Implementation of win strategies in the document
- How you stack up against the evaluation criteria
- Incorporation of customer and competitive intelligence

"Instead of dumbing down by using Color Team labels, educate people in what it means to validate a proposal."

Then validate each of them, purposely and explicitly. While you are at it, feel free to add to the list. **Every question, judgment call, tradeoff, and decision made during the proposal should be subject to validation.**

It is more important that you know specifically what you want to validate than how you go about doing it. First, make a list of everything you want validated. Then for each item, pick any approach – email, a meeting, a signoff, one-person, multiple people – just make sure it is sufficient to provide the validation you need. You can validate your proposal one item at a time, or validate them in groups. Just don't lump them all together in a single meeting and hope to accomplish anything.

The goal is a winning proposal. But that decision is out of the hands of the author. So we seek a “quality proposal” instead. **A quality proposal can be defined. And the proposal process should include steps to explicitly validate what is required for quality.**

How to Achieve Proposal Validation

In developing your proposal, you will:

- Make decisions
- Invent approaches
- Incorporate information
- Address requirements
- Deliver a message
- Seek a superior score

Each decision and approach, the thoroughness of the information you have incorporated, your compliance with and fulfillment of the requirements, your message, and your score can all be validated. This validation is what you need – not some expensive proofreading.

Your first step should be to identify the specific items you wish to validate. Once you have decided what you need to validate, then you can address *how* you should go about doing it.

You don't need a team of expensive staff sitting around a table for every validation. For example, you might hand off compliance to a specific person or approach validation to a lead engineer. And you don't have to stop work on the document for a day or two while you produce a clean document and wait for the comments. Win strategy validation should be done early, before the document is even written. You may want to still hold a formal sit-around-the-table review, but it may just be to assess the evaluation score. For each validation you should identify:

- What is the scope?
- Who will participate?
- Who will lead (provide oversight, and direction)?
- What guidance will they get (written or training)?
- What is the approach (meeting, teleconference, email, etc.)?
- Will it be a formal review (fully documented) or information review (just some comments handed in)?

When implemented across an organization, it is highly recommended that you establish thresholds for certain validations. For example:

- For written RFPs with evaluation criteria and above a certain value, there should be a formal review to assess how the proposal will score
- Below a certain value, compliance can be assessed by an individual within the proposal department
- Above a certain value, win strategies should receive a formal review prior to writing. Below this value, the review may be conducted by the appropriate business unit manager.
- All proposals should have a written content plan, validation plan, pricing plan, and production plan

What to Validate:

- The capture plan and proposal readiness (pre-RFP)
- Outline/Content Plan
- Validation Plan and Production Plan
- Win themes/strategies
- Compliance
- Accuracy (proofreading and assembly)
- Effectiveness of the approach
- Decisions
- Pricing
- Persuasiveness of the writing
- Completeness of the document
- Win strategy implementation
- Anticipated evaluation score
- Incorporation of customer and competitive intelligence

How to Validate:

- Sign-offs/approvals
- Checklists
- Meetings
- Teleconferences
- Email
- Online

- Formal (written procedures/findings)
- Informal (mark-up)

- By an individual
- By a group

- All proposals should have a review to compare the draft to the content plan. Above a certain value, this should be a formal review. Below a certain value, this review can be conducted by an individual.
- Proposals in which we are not the incumbent should have their staffing validated by the business unit manager prior to writing.

Different organizations have different needs for validation.

Some markets are more chaotic or have more inherent risk than others. Even within a single company, some proposals have more risk than others. One of the problems with the traditional “Red Team” was that it did not reflect these different needs. There is no one-size-fits-all review procedure for proposals.

Every Proposal Needs a Validation Plan

Your proposal start-up planning should include a written Validation Plan. This plan will identify what will be validated prior to submitting the proposal and how it will be validated.

Luckily, this approach lends itself to checklists and forms. The list of items to validate and the methods for validation (including any thresholds), can be formatted as a checklist. This is what we have done in our own implementation of this methodology. Creating a “Validation Plan” becomes a simple matter of selecting the items to validate, selecting an approach for each item, and then assigning names and scheduling the validation. **Having a written validation plan enables you to obtain consensus and to set expectations regarding what should be validated and what level of validation is sufficient.**

Timing is Everything

While there is no good time for a Red Team (it can be either too early or too late), performing explicit validation enables things to be considered at the appropriate time.

- Plans and approaches should be validated prior to writing.
- Compliance can be validated on an early draft. You do not necessarily need a near-final draft to validate compliance.
- Win themes should be validated prior to writing. Then their inclusion in a draft (any draft) can be validated against the plan.
- A draft that deviates from the plan can be caught early (and either the draft changed or the plan updated).
- A formal draft review (what previously might have been called a “Red Team”) can now focus exclusively on how to improve the evaluation score.
- A late review of the full document may be accommodated if it is limited to only things that have not already been validated.



Plans should be validated prior to execution. Results should be evaluated against a draft *and* against the plan. Work does not have to stop completely in order to validate many attributes (such as compliance) against a draft.

How to Implement the New Proposal Validation Model

Start with a List. Create a list that identifies what should be validated prior to submission of the proposal.

Identify your Approaches. Sometimes it makes sense to have a sit-around-a-table review. Some may need a team, others can be

validated by a careful individual. Sometimes you just need a sign-off. Some reviews can be via email or teleconference. Some reviews will be formal (fully documented), while other can be informal. For each item on your Validation List, identify the approach and participants.

Determine Your Thresholds. When there is a lot at stake or the risk is high, you require a formal review, a team instead of an individual, or physical presence. Try to leave things flexible, since a review plan can be changed or vetoed if the approaches chosen are insufficient for a particular effort.

Make sure every proposal has a Validation Plan. The list identifying what needs to be validated, when combined with the approach you are going to take for each item, forms a Validation Plan for your proposal. Every proposal must have a Validation Plan. Otherwise you leave it up to chance to determine what (if anything) actually gets validated.

Turn it into a Form/Checklist. Most of your proposals will have similar validation requirements. So turn the list into a form with check boxes for each validation item and possible approach. The idea is to enable you to prepare a Validation Plan in just a few minutes by filling out the form.

Validate each Validation Plan. Just because on one proposal it is sufficient to have a single person validate compliance doesn't mean that it's acceptable for all proposals. So after someone prepares a Validation Plan it should be circulated to key stakeholders to determine whether it is sufficient for this proposal.

How to Turn Down a Request for a Red Team

From now on, when I am asked “When will we have the Red Team?” I will answer:

We are not having a Red Team. Red Teams are no longer a best practice. Instead we will explicitly identify what we are going to validate before submitting the proposal and we will validate each and every item. Some may require a meeting, some may just be a sign-off. I will prepare a Validation Plan that identifies each type of validation and how it will be performed and submit it for approval. When we execute the Validation Plan, people will know what is expected of them and receive appropriate guidance. This will add more value than I’ve ever seen a Red Team deliver.

Conclusion

You will be tempted to include a “Red Team” in your Validation Plan. If you do that, you carry into the future the confusion that will corrupt your efforts at validating specific items. Participants will fall back on old habits and execute the process the only way they know how. So banish the word “Red Team” and all other color team labels. If you are going to validate something, then call it out specifically.

When you implement this approach you may find your list of items to validate growing rapidly. This is a good thing. If you really do track every question, judgment call, tradeoff, and decision made during the proposal in order to validate it, you’ll find that you can’t possibly schedule enough meetings. You will find that some things you have to leave to individuals and working groups to sign off on. This is OK. If you get people reflecting and reconsidering and then deciding each key issue, you will be better off.

Every decision cannot go to the top or be settled by a committee. Instead, you must determine what level of validation is sufficient. And this changes group-to-group and proposal-to-proposal. By training your organization to prepare Validation Plans, you force them to confront what the word “sufficiency” means at the beginning. You identify who will decide and who will second-guess. And you schedule a time to do it and put it behind you.

So let the list grow. Doing anything else would be ignoring the reality of the issues faced during proposal development. Instead of fighting it, channel into an approach that provides validation in a way that you can feasibly implement. **In the end you will find that you validate more things than ever before and do a better job of it, with less disruption to the proposal. If you accomplish this, your review process will be adding value instead of holding you back.**

About the Author

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