

# ***Strategies for Orals Preparations***

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# Summary

- Preparing for orals for USDOE proposals should be treated like a project with
  - an experienced project manager
  - budget, schedule, and milestones –
  - closely related to, but separate from, the written technical proposal
- Depending on the proposal, training programs can last from several weeks to several months
- Training must emphasize teamwork, problem-solving, Q&A experience, and timing

# Treat Orals Like a Project

- For major DOE proposals, the orals process has become a significant part of the proposal budget
  - Need for cost controls, schedules, deliverables, etc.
  - In other words, a major project management challenge, so treat the orals like a project
  - Use standard project controls and scheduling software as you would for a major project

# Treat Orals Like a Project (cont.)

- Manage the orals project separately from the written proposal but linked to the written proposal and led by a separate project manager
  - Both project managers should report to the Capture Manager
  - Both should have some role in selection of key personnel, reporting to the Capture Manager and Team Management
  - Both should have some role in development of win themes, discriminators, and related topics such as proposal design, graphics, etc.

# Treat Orals Like a Project (cont.)

- The slides that accompany the written proposal are the first major deliverable for the orals project – assuming slides are submitted with the written proposal
  - Slides may/may not be point-scored in the evaluation criteria, but treat them as if they are
  - Key personnel must have the major role in preparing them since they will deliver them to customer
  - Slides must be Red-teamed and reviewed along with the rest of the written proposal – do not wait until the end to prepare and review slides

# Treat Orals Like a Project (cont.)

- After the written proposal and slides are submitted, orals preps become highest priority
- Do not release all of the people who supported the written proposal – some are needed for key personnel training, Q's & A's, sample problem development, etc.

# Orals Training

- Orals training is expensive since it requires in-person commitment of very senior personnel and support staff for weeks (or in some cases, months)
- Orals Project Manager develops training schedule with the proposed Project Manager

# Orals Training (cont.)

- Key elements of the training schedule are
  - Concentrated training in the details of the written proposal for any key person who was not intimately involved in its preparation
  - Topic papers and briefings for the key personnel



# Orals Training (cont.)

- Topic papers and briefings are usually prepared by Subject Matter Experts and/or the key personnel themselves
  - Covering issues such as ISMS, state/local regulatory environment, labor relations issues, transition plan, etc.
  - These papers/briefings ensure that all key personnel understand basic processes used by the team when they win, and that they give consistent answers to problems and questions in the orals

# Orals Training (cont.)

- If the key personnel did not perform as a team during the written proposal preparation, then the orals training process needs to focus first on that
- ***The ability to work together as a team is perhaps the most important orals evaluation criterion for most DOE proposals***
  - Sometimes explicit in the criteria
  - Always implicit in the evaluator's minds

# Orals Training (cont.)

- Teamwork is critical when solving sample problems and answering questions
- Teams should practice at least 5 or 6 sample problems, and many more than that if time and budget allows

# Orals Training (cont.)

- Teams should develop their own process for problem solution
  - Directly related to the management plan in the proposal
  - Not imposed by consultants
- Sample problems should be harder than the problems expected in the actual orals
  - use the technical staff that helped prepare the proposal

# Orals Training (cont.)

- Training in time management is important for sample problems as well as for presentations during the orals
- Coaching in style, dress, and demeanor is important but not the highest priority – often given too much attention by many teams and “style consultants”

# Orals Training (cont.)

- Training in Q&A response is a critical part of orals training – “answer the question!”
- Important aspect of training is to ensure that the team defers to the Project Manager
  - She/he is in charge at all times
  - It sounds silly, but proposals have been lost when team argues with PM during orals

# Conclusion

- “Orals are our friends” – Orals should not be viewed as equivalent to a Death March or root canals
- They are one of the principal ways that a team has to demonstrate to the customer that they know the proposal and know what they are doing!
- Because of the time and expense involved, treat orals like a project

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