



Proposal Management GNG to Close Out

Sarah Kinnard, CPSM
FGM Architects

Part 1

Philosophy & Approach

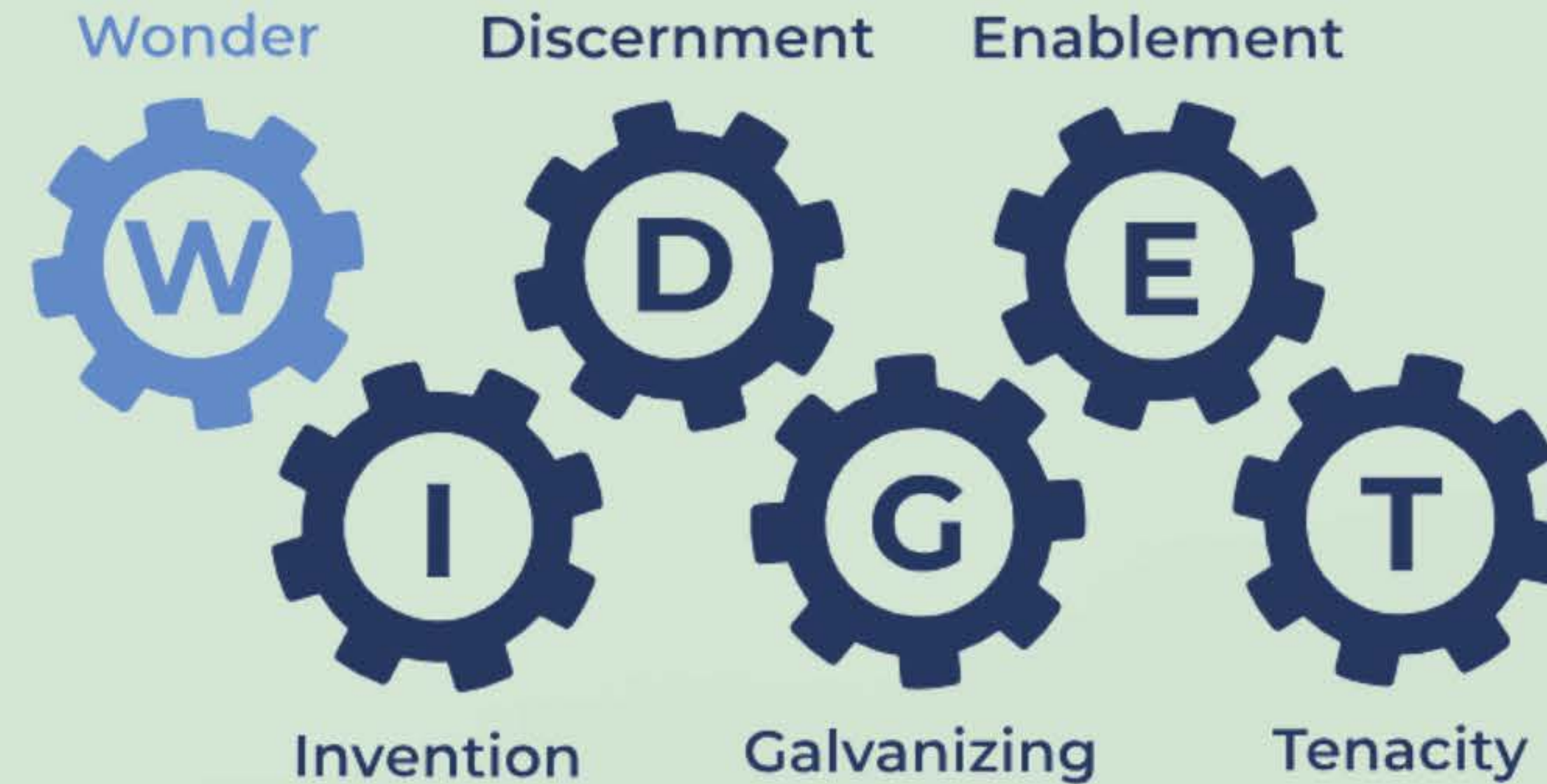
Grounded Leadership

- Support all tasks, regardless of level
- Hands-on approach
- Build goodwill
- Maximize efficiency

Self-Acceptance

- Know your strengths & weaknesses

The 6 Types of Working Genius

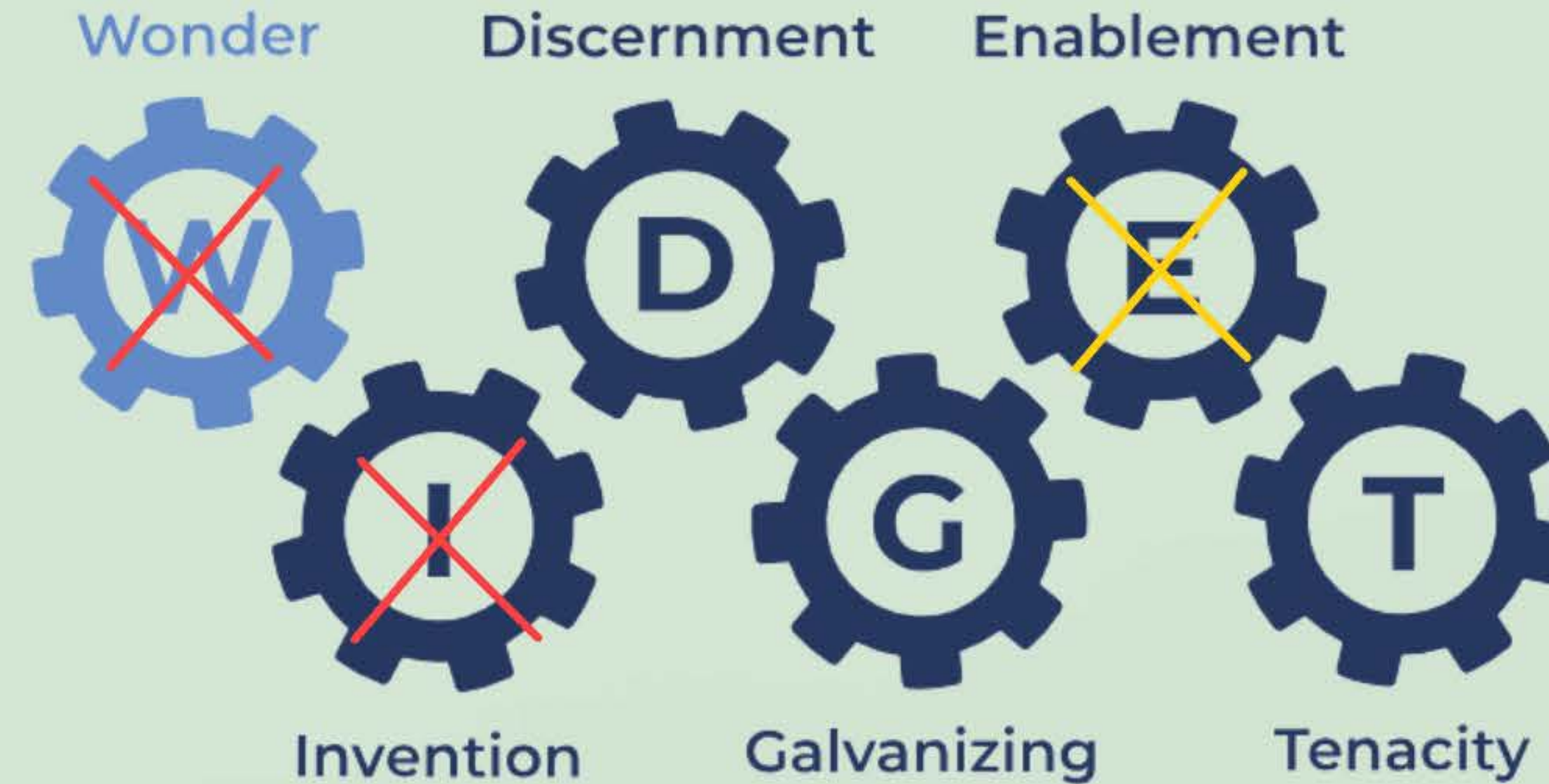


www.workinggenius.com

Self-Acceptance

- Know your strengths & weaknesses

The 6 Types of Working Genius



www.workinggenius.com

Communication Really is Key

- Clear, Concise, Consistent (but not annoying)
- Adapt to team preferred communication style
- Over communicate

All, please see draft of the AACOP tri-fold and provide comments: T:\00 Brochures\00 Tri-Fold Brochures\2025\04.2 Police\04.2 Police AACOP.pdf

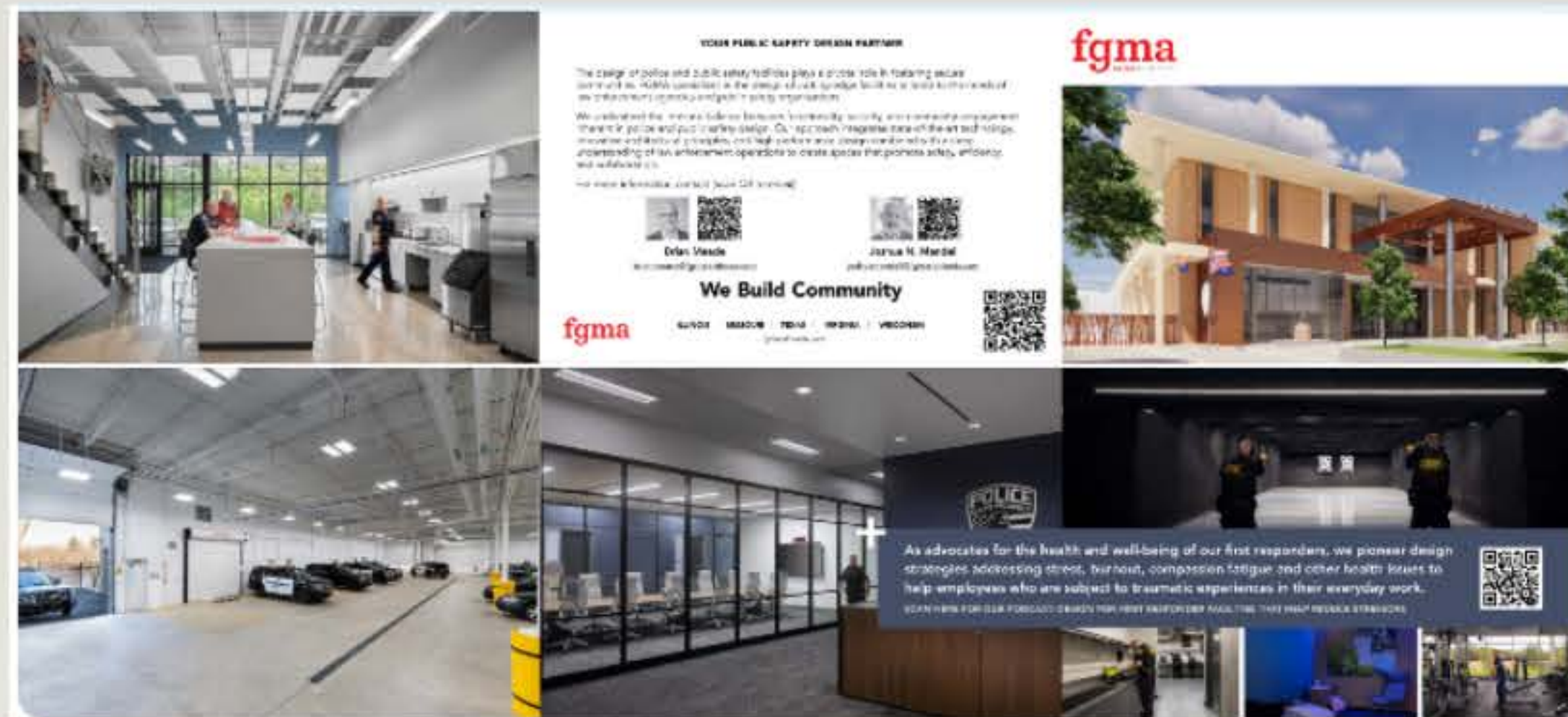
Vague, no deadline, pdf not accessible via mobile, no specific person identified

All, please see draft of the AACOP tri-fold and provide comments: T:\00 Brochures\00 Tri-Fold Brochures\2025\04.2 Police\04.2 Police AACOP.pdf

Vague, no deadline, pdf not accessible via mobile, no specific person identified

@Brian Meade @joshua n. mandell please review the AACOP tri-fold and **provide edits by EOD this Wednesday (2/12)**

"T:\00 Brochures\00 Tri-Fold Brochures\2025\04.2 Police\04.2 Police AACOP.pdf"



Specific people tagged, deadline provided, link to pdf AND image for review on the go

Handle Missteps with Intention

- Bad news never gets better with time
- Control the narrative
- Owning mistakes builds respect



Part 2

Proposal Management

Tracking and Coordination

- Find what works for you and your team (Asana, Excel, CRM)
- Formal GNG process
- Calendar invites for deadlines and milestones
- Keep tracking up to date

2025 Proposal Tracking

[List](#)
[Overview](#)
[Board](#)
[Calendar](#)

+ Add task

Task name	Proposed By	Actual Date	Deadline %	Previous date	Region	DM	MD assigned	Planned on %	Proposed By	Task Progress	Delivery Mile
GNG											
2025-2026 Regional W-Workshop Chicago-WB	Col/Nic-Ga	02/24/2025	Jan 22 - Feb 24	Municipal	Chicago	Joanna Z.		100%	Waiting T.	Not Start	
2025-2026 Regional W-Workshop Milwaukee-WB	Col/Nic-Ga	02/25/2025	Feb 09 - 21	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Springfield-Houston-WB	Col/Nic-Ga	02/26/2025	Feb 4 - 28	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Col/Nic-Ga	03/28/2025	Jan 11 - Feb 28	Municipal	Chicago	Joanna Z.		100%	Waiting T.	Not Start	
2025-2026 Regional W-Workshop Houston-WB	Col/Nic-Ga	03/28/2025	Jan 11 - Feb 28	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	
2025-2026 Regional W-Workshop Houston-WB	Col/Nic-Ga	03/28/2025	Feb 1 - Mar 1	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	
Add task											
Active Proposals											
2025-2026 Regional W-Workshop Chicago-WB	Proposed	02/11/2025	Feb 7 - Today	Municipal	Austin	Alexandra	Joanna Z.	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Milwaukee-WB	Proposed	02/11/2025	Jan 19 - Today	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Springfield-Houston-WB	Proposed	02/16/2025	Jan 11 - Feb 19	Municipal	Chicago	Joanna Z.	NOT NEEDED	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	02/18/2025	Jan 10 - Feb 19	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Houston-WB	Proposed	03/16/2025	Feb 4 - 28	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	03/23/2025	Feb 04 - 27	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Houston-WB	Proposed	03/27/2025	Jan 29 - Feb 27	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	03/28/2025	Jan 11 - Feb 28	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Houston-WB	Proposed	03/30/2025	Feb 1 - Mar 1	Municipal	Austin	Alexandra	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	03/30/2025	Feb 10 - Mar 9	Municipal	Austin	Alexandra		100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Houston-WB	Proposed	03/31/2025	Jan 11 - Mar 10	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	03/24/2025	Jan 10 - Mar 24	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Houston-WB	Proposed	03/25/2025	Jan 11 - Mar 24	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final
2025-2026 Regional W-Workshop Chicago-WB	Proposed	03/25/2025	Jan 11 - Mar 24	Municipal	Chicago	Joanna Z.	Alexandra	100%	Waiting T.	Not Start	Final

FGMA Process

- GNG
- Zoom Channel
- RMM/MC Outline
- Kickoff
- SR Review
- Marketing QA/QC
- Project Team QA/QC
- Close Out

Technical Staff: This should just be a copy and paste of that other proposal.

Me:



GNG

- Raise concerns early and often
- Set clear expectations
- Stand firm on boundaries
- Improve win rate with good decisions

Marketing pretending to be shocked when we aren't selected for that project we shouldn't have pursued in the first place.



Outline

- Prepare for kickoff effectively
- Identify long-lead items early
- Explain rationale behind decisions to coordinators
- Set expectations, deadlines, and uncover potential issues

The screenshot shows a Microsoft Excel spreadsheet titled "Proposal Outline". The spreadsheet is organized into columns A through I. The first row (row 1) is a header row with the title "Proposal Outline" in column A. The second row (row 2) is a sub-header row with "Construction Estimate" in column A and "\$" in column B. The third row (row 3) is a sub-header row with "Fee Estimate" in column A and "\$" in column B. The fourth row (row 4) is a sub-header row with "Unknown: IDIQ or Task Order = \$1 / Single Project = \$10K" in column A. The fifth row (row 5) is a sub-header row with "Red Flags" in column A and "Ex: lack of applicable projects/experience, distance, lack of staff capacity" in column B. The sixth row (row 6) is a sub-header row with "Project Name" in column A. The seventh row (row 7) is a sub-header row with "MK Number" in column A. The eighth row (row 8) is a sub-header row with "Due Date" in column A. The ninth row (row 9) is a sub-header row with "Time" in column A. The tenth row (row 10) is a sub-header row with "Presubmittal Date/Time" in column A. The eleventh row (row 11) is a sub-header row with "MK QAQC Due" in column A. The twelfth row (row 12) is a sub-header row with "Project Team QAQC Due" in column A. The thirteenth row (row 13) is a sub-header row with "Print Deadline" in column A. The fourteenth row (row 14) is a sub-header row with "Ship Deadline" in column A. The fifteenth row (row 15) is a sub-header row with "Questions Deadline (day & time)" in column A. The sixteenth row (row 16) is a sub-header row with "Question Submission Detail (email/website/special subject line, etc.)" in column A. The seventeenth row (row 17) is a sub-header row with "Any known PTO for Proposal Team?" in column A. The eighteenth row (row 18) is a sub-header row with "If yes - who/when" in column A. The nineteenth row (row 19) is a sub-header row with "Open Asset Link" in column A. The twentieth row (row 20) is a sub-header row with "Link to RFQ" in column A. The twenty-first row (row 21) is a sub-header row with "Delivery Type" in column A. The twenty-second row (row 22) is a sub-header row with "Link to Upload (for digital delivery)" in column A. The twenty-third row (row 23) is a sub-header row with "Email or Delivery Address" in column A. The twenty-fourth row (row 24) is a sub-header row with "Who is delivering? (FGMA employee, FedEx, etc.)" in column A. The twenty-fifth row (row 25) is a sub-header row with "Print Method (full bleed / non bleed)" in column A. The twenty-sixth row (row 26) is a sub-header row with "Number of Copies" in column A. The twenty-seventh row (row 27) is a sub-header row with "Digital Copy Requirement (email, USB, etc.)" in column A. The twenty-eighth row (row 28) is a sub-header row with "Packaging Requirements? (Fee in separate envelope, labeling, etc.)" in column A. The twenty-ninth row (row 29) is a sub-header row with "Font Restriction" in column A. The thirtieth row (row 30) is a sub-header row with "Page Limit" in column A. The spreadsheet also includes a calendar for February 2020 in the top right corner and a tab bar at the bottom with tabs for "Key Information", "Research", "HPD", "Questions for Client", "Team", "Projects", "TOC", "Tab 1", "Tab 2", "Tab 3", "Tab 4", "Tab 5", "Tab 6", "Tab 7", "Tab 8", "Tab 9", "Selection Criteria & Weights", and "QAQC Checklist".

The screenshot shows a Microsoft Excel spreadsheet titled "Section Name". The spreadsheet is organized into columns A through D. The first row (row 1) is a header row with "Section Name" in column A. The second row (row 2) is a header row with "Selection Criteria Weight" in column A. The third row (row 3) is a header row with "Page Limit" in column A. The fourth row (row 4) is a header row with "Question(s)" in column A, "Person Responsible" in column B, "Link to Reponse Page" in column C, and "Notes" in column D. The fifth row (row 5) is a data row. The sixth row (row 6) is a data row. The seventh row (row 7) is a data row. The eighth row (row 8) is a data row. The ninth row (row 9) is a data row. The tenth row (row 10) is a data row. The eleventh row (row 11) is a data row. The twelfth row (row 12) is a data row. The thirteenth row (row 13) is a data row. The fourteenth row (row 14) is a data row. The fifteenth row (row 15) is a data row. The sixteenth row (row 16) is a data row. The seventeenth row (row 17) is a data row. The eighteenth row (row 18) is a data row. The nineteenth row (row 19) is a data row. The twentieth row (row 20) is a data row. The twenty-first row (row 21) is a data row. The twenty-second row (row 22) is a data row. The spreadsheet also includes a tab bar at the bottom with tabs for "Key Information", "Research", "HPD", "Questions for Client", "Team", "Projects", "TOC", "Tab 1", "Tab 2", "Tab 3", "Tab 4", "Tab 5", "Tab 6", "Tab 7", "Tab 8", "Tab 9", "Selection Criteria & Weights", and "QAQC Checklist".

Production Phase

- Time is our most valuable asset
- SR Review
- Provide good starting points for technical team
- Proposal assignments - coordinator vs. manager
- Keep coordinator informed / copy coordinators on all requests

Me: Do you have your content for the interview slides done?

PM: I'm think just kinda going with the flow.



The flow

QA/QC

- Clear feedback & direction
- Provide information
- Handle major changes
- Ensure clean document goes to technical team
- Make technical team's review as easy as possible

We QA/QC
and we don't
judge
—

FGMA MARKETING

Close Out & Debrief

- Communicate submission to team
- Share updates as relevant
- Help you, help you by updating root documents and saving new content

	A	B
1	PDF	
2	Create copy of final PDF with CLOSEOUT at the end	☐
3	Add comments into PDF for items to be picked up in close out	☐
4	Add link to final copy of PDF in Zoom channel	☐
5	Add link to shortlist questions in Zoom channel	☐
6	Create Vision/Buzz pdf with FINANCIAL INFO REMOVED (MK number at beginning of file name, file must be less than 50mb)	☐
7	Save project approach section as pdf in T:\0000 Proposal Builder\08 Project Approach\PDF	☐
8		
9	InDesign	
10	Update Root Documents (save all that were discussed on the Debrief, make changes as you go in the proposal process, or make sure you made all corrections during closeout)	☐
11		
12	Save out new content (as directed by RMM)	☐
13		
14	Bluebeam	
15	Review edits and pick up in Root	☐
16	Close Session	☐
17	Finish Session	
18	Save to PDF > Drafts > Edited Drafts	
19		
20	Vision	
21	Opportunity	
22	General Tab	
23	Construction \$	☐
24	Fee \$	☐
25	Upload Final PDF (financials redacted)	☐
26	Intranet Opportunity Directory is checked	☐
27	Update proposal status from in process to submitted	☐
28	Proposal Tab	
29	Coordinator assigned	☐

< > ...

HPD

Questions for Client

Team

Projects

TOC

Tab 1

Tab 2

Tab 3

Debrief Date		
Participants		
Example Questions	Notes	
What was done well?		
What didn't go that well?		
What did we do right to make this proposal successful?		
Were the proposal milestones met? If not, why?		
Did you have all the resources needed to do your best work?		
How effective was communication between team members and proposal management?		
How could we simplify or automate things in the future?		
If there were any bottlenecks, what were they, and how could you resolve them in the future?		
What did you learn from this proposal that can be used on future proposals?		
General feedback/notes		
Vision Updates	Complete	Completed by (Initial)
Proposal Status Updated	☐	
Construction \$	☐	
Fee \$	☐	
Estimated Start/End Date	☐	
GNG Score	☐	
GNG Approved/Completed By	☐	
Internal Team	☐	
External Team	☐	
Competition	☐	
Add MK contact for Subs if not already in	☐	

< > February 2025

Sa

Mo

Tu

We

Th

Fr

Sa

29

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31