

eBook: Using VisibleThread During the Proposal Life Cycle

2016 – by VisibleThread

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INTRODUCTION

This eBook shows the ways proposal teams can use the VisibleThread tool within established proposal management processes.

At a minimum, the tool use increases quality, enables effective use of time and allows rapid performance of some mundane tasks.

The intent is not to have you skip your current internal processes, but to augment them with VisibleThread. Use the tool where it makes best sense to speed up existing process steps. In summary:

- The tool helps to **identify proposal problems** in your proposal.
- The **user must review all outputs** from the tool, verify the results, and then
- Determine the best way to fix confirmed issues.

Early use of the tool provides the most benefit, in terms of efficiency and quality improvement. This is also when specific proposal concepts (defined in 'Concept Lists') are established. You can continue to use the established concepts throughout the development of the proposal.

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1.0 RFP RELEASE & PROPOSAL KICK OFF

1.1 CREATE A STARTER COMPLIANCE MATRIX

One of the first things sales proposal professionals do is to manually ‘shred’ or ‘burst’ the solicitation doc(s). The result of this is a ‘compliance matrix’, typically an Excel spread sheet. The matrix itemizes all requirements. Sometimes it’s called a ‘requirements compliance matrix’. The purpose of the matrix in the context of a sales proposal is to itemize every requirement and ensure you meet or comply with the requirement. You can create a starter compliance matrix in 1-click directly from VisibleThread. For Sales teams, especially government contractors this is a huge time saver.

Primary – This category consist of verbs to check for in the solicitation documents in order to ensure that the proposal meets all requirements. Examples of primary verbs are “will”, “must”, “shall”, “should”, “include”, “insure”, “assure”, etc.

Secondary – This category consist of less clear-cut verbs and possible synonyms that may imply obligations that may need to be de-risked.

Examples of secondary verbs are “apply”, “commit”, “compel”, “consent”, “enforce”, etc.

Optional – This category consist of terms that may require review for possible obligation. Examples of optional terms are “may”, “intend”, “anticipate”, “assume”, “plan”, etc.

Notes:

- ◆ **Figure 1** shows an example of the Quality Analysis Tab after performing a Quality Scan using the “Bid – Compliance Scan v5” dictionary.
- ◆ The terms “will”, “shall”, “must”, etc. are predefined in the “Bid – Compliance Scan v5” dictionary. Please see the Quality Scans subfolder under ‘Dictionaries’.

The screenshot shows the VisibleThread software interface. The 'Quality Analysis' tab is active, displaying a compliance matrix for a document titled 'Bid - Compliance Scan v5'. The matrix lists terms such as 'shall', 'provide', 'document', 'ensure', 'will', 'includes', 'submit', 'list', 'provides', and 'include', along with their counts and checkboxes. A table at the bottom shows the document content for each term, including page numbers, term references, and document content snippets. Annotations include a red box around the 'Create Compliance Matrix' button, a blue arrow pointing to the 'Terms found in this doc' section, and another blue arrow pointing to the 'Content extracted from doc' section.

Page	Term	Ref	Document Content	Document
2	provide	1	1 Introduction The purpose of this contract is to provide high end computing and data support, as well as general support services, for the NASA Goddard Space Flight (GSFC) Computational and Information Science and Technology Office (CISTO). This Statement of Work (SOW) covers all three CISTO groups and some additional support services for the NASA High End Computing program.	06 DRAFT SOW NNG12411365...
2	includes	2	2 Background The Computational and Information Sciences and Technology Office (CISTO) provides Information Technology (IT) and computational services to support the GSFC Sciences and Exploration Directorate (SED). This includes access to high-performance computing, networking, mass storage, information systems technologies, computational science expertise, real time transmission of satellite data, and support for the NASA High End Computing (HEC) Program.	06 DRAFT SOW NNG12411365...
2	include		The NCCS (http://nccs.nasa.gov) is one of two high-end computing facilities within the NASA High End Computing (HEC) Program (http://www.hec.nasa.gov). The NCCS supports high-end computational modeling of Earth science, space science, and exploration. The NCCS is a key resource in the effort to increase understanding of Earth's climate system, natural and human influences on climate and consequences for life on Earth, and to advance space science and scientific exploration beyond	06 DRAFT SOW NNG12411365...

Figure 1: Sample Compliance Matrix

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- ◆ The user can also use the Quality Scan mechanism for identifying clichés, buzzwords, measurability, open ended, etc. in proposals. More information on this topic is in Section 2.2 of this document.
- ◆ **Figure 2** shows an example of the generated compliance matrix in excel

	A	B	C	D	E	F	G	
1	VisibleThread	Starter Requirements Compliance Matrix for "01 DRAFT RFP NNG12411365R.pdf"						
2	generated 21 Jul 2014 10:32							
3	To collapse all groups:							
4	Generated By:	a. select all rows (Shift-Ctrl-End)						
5	fergal1@insure-corp.com	b. click on "Data" tab						
6	using 'Bid - Compliance Scan v5'	c. click 'Hide Detail'						
7								
8	Category	Keywords	Page	#	Content	Document	Your comments here...	
42	Secondary	request	5		Solicitation Draft Request for Proposal NNG12411365R CISTO-SCTS	01 DRAFT RFP NNG12411365R.pdf		
43			5	6		01 DRAFT RFP NNG12411365R.pdf		
44	Secondary	obligated requires	5	(a)	(a) Minimum order. When the Government requires supplies or services covered by this contract in an amount of less than \$1,000, the Government is not obligated to purchase, nor is the Contractor obligated to furnish, those supplies or services under the contract.	01 DRAFT RFP NNG12411365R.pdf		
45	Secondary	contractor obligated	5	(b)	(b) Maximum order. The Contractor is not obligated to honor—	NNG12411365R.pdf		
46			5	(1)	(1) Any order for a single item in excess of \$10 million;	01 DRAFT RFP NNG12411365R.pdf		
47			5	(2)	(2) Any order for a combination of items in excess of \$10 million; or	01 DRAFT RFP NNG12411365R.pdf		
48			5	(3)	(3) A series of orders from the same ordering office within 30 days that together call for quantities exceeding the limitation in paragraph (b) (1) or (2) of this section.	01 DRAFT RFP NNG12411365R.pdf		
49	Primary Secondary	requirement contractor required includes	5	(c)	(c) If this is a requirements contract (i.e., includes the Requirements clause at subsection 52.216-21 of the Federal Acquisition Regulation (FAR)), the Government is not required to order a part of any one requirement from the Contractor if that requirement exceeds the maximum-order limitations in paragraph (b) of this section.	01 DRAFT RFP NNG12411365R.pdf		
	Primary	contractor	5	(d)	(d) Notwithstanding paragraphs (b) and (c) of this section, the Contractor shall honor	01 DRAFT RFP		

Extracts sections



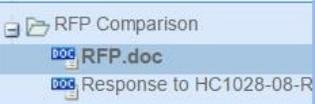
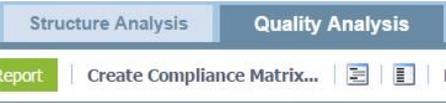
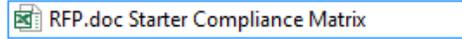
Pulls out list items



Figure 2: Generated Compliance Matrix in Excel

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents.	Click  'New Folder' at top left
2. Upload your Solicitation documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
3. Select the newly created proposal folder	
4. Click on the "Quality Analysis" tab	
5. Now in the left panel, click on the specific file you will be using for the compliance matrix. For example this might be a full RFP, PWS (Performance Work Statement) or SOW (Statement of Work).	
6. Click the "Create Compliance Matrix..." Button	<p>Find 'Create Compliance Matrix...' under right under the Quality Analysis tab:</p> 
7. Confirm "Bid - Compliance Scan v5" is the dictionary you would like to use by clicking "Yes"	
8. When the scan completes, check your downloads for the generated shred Excel document	
9. Open the Excel Spreadsheet and in the "File Download" window, click "Save" and save to the location of your choice	

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Create a Starter Compliance Matrix in 3 minutes” – <https://visiblethread-1.wistia.com/medias/ddr5st53g4>



Blog Post: “A (first pass) Compliance Matrix in under 10 minutes – Myth or Reality?” - <http://www.visiblethread.com/2012/03/a-compliance-matrix-in-10-minutes-%E2%80%93-myth-or-reality/>



Help File - Section 9.4: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

1.2 DISCOVER FREQUENCY OF WORD USE AND THEMES IN THE SOLICITATION AND/OR PROPOSAL

Discovery allows you quickly get an immediate sense of what topics are referenced in documents. It automatically extracts concepts (or subject of sentences). We extract the ‘concepts’ using [NLP](#) (Natural Language Processing) techniques.

To see this in action, upload one or more document(s) to a folder, click the ‘Discovery’ tab, and see how the themes are presented in the discovery area. There is no need for pre-configured dictionaries when using discovery.

If you upload solicitation docs either in draft or final form, discovery can let you easily find key items. For instance show me all references to ‘security’ etc.

Using VisibleThread During The Proposal Life Cycle

Theme with Items listed

Each column shows a doc. Numbers are occurrences

Exact Text in documents based on checked items above

Theme	Items (2270)	Freq.	06 DRA...	TXZ-C...
data	data	29	15	11
data	Internet registry data	8		8
data	Tool/Data Access	6		6
data	Data Aggregation	5		5
data	Data Sensing	5		5
data	Data Visualization	5		5
data	data publication services	4	4	
data	proprietary and open source data elements	4		4
data	BGP data	3		3
data	network and Internet data	3		3

Themes (767)	Items	Freq.
- All Themes -	2270	4544
data	139	228
contractor	6	135
network	73	128
CISTO	15	90
services	32	85
support	43	79
software	45	73
user	31	61
development	35	57
Project	18	54
TXZ	11	53

Page / Heading / Worksheet	Item Found	Ref	Document Content	Docume
Page 15	data publication services	c.	c. Assisting users in making use and taking advantage of the data publication services.	06.D
Page 15	data publication services		The contractor shall work with users to register and publish data through the data publication services. The contractor shall create and share documentation of how to use the data publication services. The contractor shall resolve any issues related to the data publication services.	06.D

Figure 3: Discovery Window

Notes:

- ◆ Give a lot of attention to words that appear often in the solicitation as well as Sections L&M.
- ◆ Check for sensitive terms like 'security', 'clearance', 'damages' etc.
- ◆ If you want to focus only on L&M, then take the RFP and strip out all sections before and after, save it as a different file name and upload it.

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- ◆ In some cases, a word appears often because it is included in the solicitation header or footer.
- ◆ When you see a term that is important for your customer, then you can also add it to the Concept List. Click 'Add to concept list' in the toolbar in the central panel. We will see later in sections **2.2** and **2.3** how you can use Concept Scans to verify that your proposal content address the government requirements.

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your Solicitation documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
3. Select the newly created proposal folder	
4. Click on the "Discovery" tab	
5. In the center panel, you will see results similar to those in Figure 3 above	

Related Items:



Help File - Section 6: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

1.3 EXTRACTING ACRONYMS FROM SOLICITATION DOCS

If your customer (Government or Commercial) uses certain acronyms, then you need to make sure you are speaking also in those same terms. This demonstrates alignment and shows that you understand the customer's business domain.

You can run an Acronym Extraction process on one of more solicitation docs. Then export the results to a spreadsheet, allowing you quickly add that list to your proposal as an appendix. Then make sure everything is correctly referenced.

Notes:

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- ◆ The first screenshot below is a report showing the identified acronyms from an RFP, Statement of Work
- ◆ The second screen shot below is an Excel export of the same data.

Acronym Report

06 DRAFT SOW NNG12411365R.pdf

Export to Excel →

[Edit Acronym Ignore List →](#)

Total likely acronyms	Well-defined acronyms	Acronyms with No Definition with Multiple Definitions used before Definition
37 unique found	18 out of 37 Acronyms	12 7 1

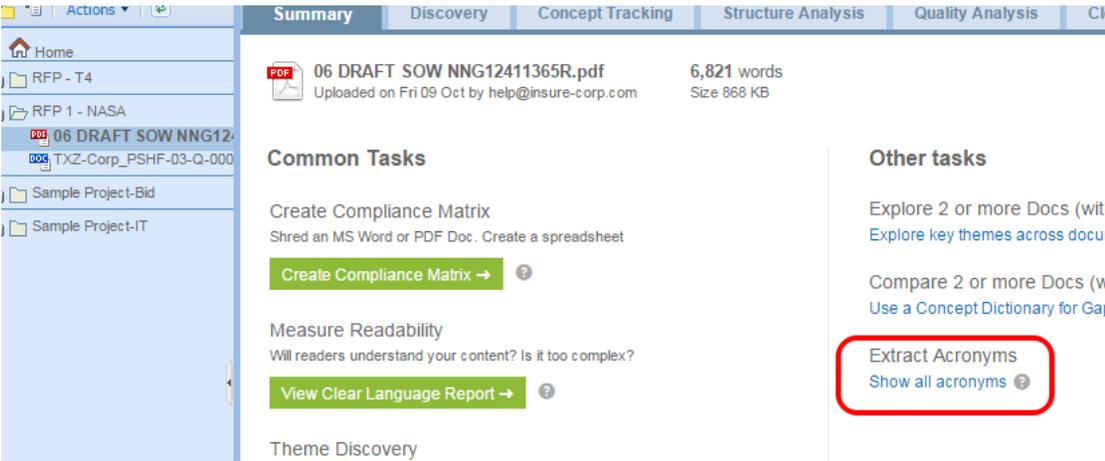
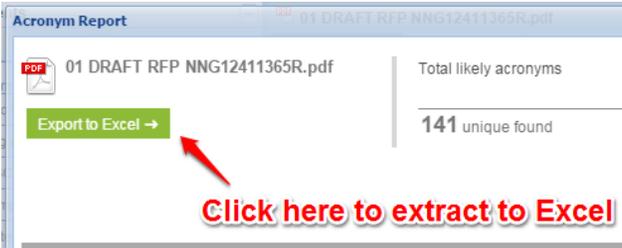
Acronym	Definition	Status	Location	1st occurrence	Count
ACES	-	Not defined	Page 17	Coordinating, ordering, tracking, cost analysis and providing a single point of contact between CISTO and NASA managed services (e.g., ACES) for such things as personal computing hardware, software, and mobile platforms.	1
CISTO	Computational and Information Science and Technology Office	✓	Page 2	1 Introduction The purpose of this contract is to provide high end computing and data support, as well as general support services, for the NASA Goddard Space Flight (GSFC) Computational and Information Science and Technology Office (CISTO) .	48
CNE	Center Network Environment	Multiple definitions	Page 4	The SEN services GSFC projects and users who have computer network performance requirements greater than those baselined for GSFC's general-use campus- wide Center Network Environment (CNE) .	2
CNE	Center Network Environment	Multiple definitions	Page 9	Working with the Networks and IT Security (606.1) on the Scientific Engineering Network (SEN), Communications and Security Services Division (760) on the Center Network Environment (CNE) , and the NASA Integrated Services Network (NISN) in order to maintain high quality network connectivity to NASA and beyond.	2
DAAC	Distributed Active Archive Centers	✓	Page 14	Supporting and maintaining services that enable data publication through NCCS and CISTO web based services and distribution to community publication systems such as the Earth Systems Grid (ESG) and NASA's Distributed Active Archive Centers (DAACs) .	1
DB	Direct Broadcast	Multiple definitions	Page 4	Direct Readout (DR) is the process of acquiring freely transmitted live satellite Direct Broadcast (DB) data.	5
DB	Direct Broadcast	Multiple definitions	Page 19	11 Direct Readout Data Systems and Direct Broadcast Algorithm Development Direct Broadcast (DB) is the continuous real-time transmission of satellite data to the ground.	5
DMS	Data Management System	✓	Page 16	The contractor shall provide operational support of the NCCS Data Management System (DMS) , the development and implementation of policies, procedures, and workflows for DMS -managed data collections, rapid provisioning of new customer solutions using DMS technologies, and responsive end-user support for DMS customers.	4

Using VisibleThread During The Proposal Life Cycle

		A	B	C	D		
1	2	VisibleThread Acronym Report for "06 DRAFT SOW NNG12411365R.pdf"					
	2	generated 11 Oct 2015 02:38					
	3	Generated By:					
	4	insure-corp.com					
	5						
	6	Acronym	Definition	Status	Location	1st Occurrence	
	13	DB	Direct Broadcast	Multiple definitions	Page 4	Direct Readout (DR) is the process of acquiring Broadcast (DB) data.	
	14	DB	Direct Broadcast	Multiple definitions	Page 19	11 Direct Readout Data Systems and Direct Broadcast (DB) is the continuous real-time	
	15	DMS	Data Management System	✓	Page 16	The contractor shall provide operational systems (DMS), the development and implementation of DMS-managed data collections, rapid provision of DMS technologies, and responsive end-user	
	16	DR	Direct Readout	Multiple definitions	Page 4	Direct Readout (DR) is the process of acquiring Broadcast (DB) data.	
	17	DR	Direct Readout	Multiple definitions	Page 19	Direct Readout (DR) is the process of acquiring	
	18	DRL	Direct Readout Laboratory extraction tools from PDS RDR	✓	Page 4 Page 20	The Direct Readout Laboratory (DRL) supports satellite data to the ground (http://directreadout.com) Creation and implementation of automated	

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. Upload your Solicitation documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
2. Click on the "Summary" tab on right (this is the default first tab so already showing)	
3. Click the "Show all Acronyms" Button	
4. The system will display the acronym report.	
5. Export it to Excel	

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Validating acronym integrity in seconds” – <https://visiblethread-1.wistia.com/medias/efw41wb3xm>



Help File - Section 5.2: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

2.0 PROPOSAL DEVELOPMENT AND REVIEW PREPARATION

Using VisibleThread During The Proposal Life Cycle

2.1 REVIEW READABILITY OF PROPOSAL (LONG SENTENCES, PASSIVE SENTENCES, HIDDEN VERBS)

Complex, wordy sentences and passive language make it hard for customers to understand your message. Complex language can also obscure your value proposition. The highest risk is that it may also make you non-compliant.

Review documents for long sentences, passive language and hidden verbs.

There are two common scenarios where we see issues:

- 1.) Wordy and complex content especially coming from SMEs may in fact be so hard to understand that they cause compliance issues. This means that the reviewer (who most likely does not have the depth of technical expertise) will score the answer poorly or mark you non-compliant.
- 2.) Wordy and 'marketing boilerplate' in executive summaries do not sufficiently differentiate your proposal.

Notes:

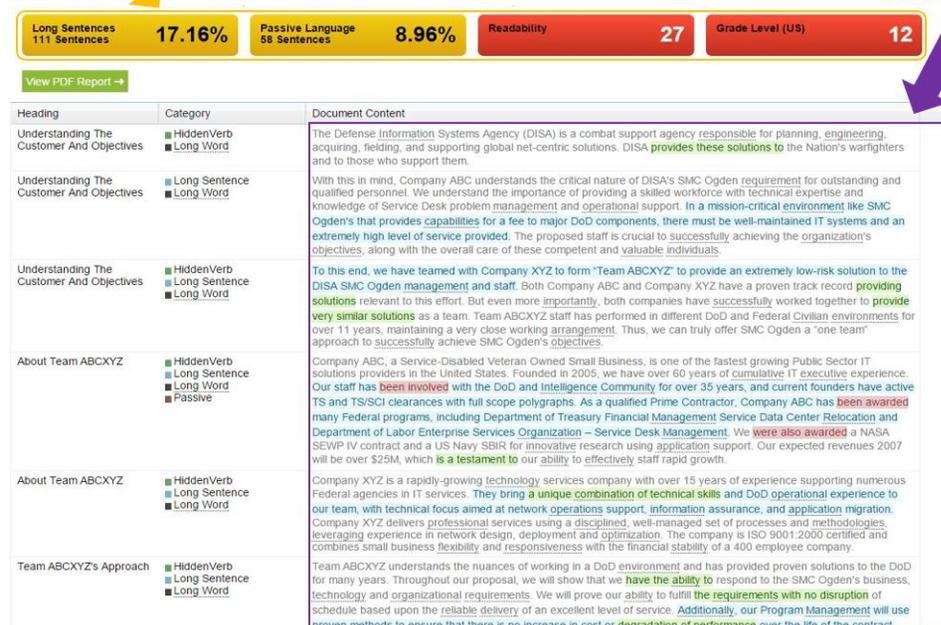
Plain Language Statistics:

- ◆ **Long Sentences:** These are sentences greater than 25 words. The % threshold can be set to a value of your choice. Long sentences mask multiple concepts. Shorten sentences provide a clear message.
- ◆ **Passive Language:** These are sentences where the subject acted upon appears before the verb. "Quality is monitored" vs. "We monitor quality". If you use active voice, you will increase clarity and strength. You will also flush out the "actor", i.e., who did the action?
- ◆ **Hidden Verbs:** We call verbs presented in a noun form, "hidden verbs". You can often simplify hidden verbs. For example, "Please make and application" vs. "Please apply". The hidden verb is "application" in the first example. Besides making it clearer, you also reduce word count by removing hidden verbs.
- ◆ **Long Words:** These are words with more than three syllables.

These are the document stats

Figure 4: Clear Language

This is the doc content



Using VisibleThread During The Proposal Life Cycle

◆ You can use the 'Home >> Summary' view as well as folder level 'Summary' view to see how documents compare. This is very useful in these 2 scenarios:

- **Compare different sections** – when you get back contributions from authors, upload the documents to see how they compare side by side. For instance, your 'Past Performance' might score well in the 'Technical Volume', while your 'Quality Control Plan' or 'Executive Summary' might be too complex or wordy.
- **Tracking progress between versions** - The screen below shows how in a Task Order, subsequent versions are becoming clearer.

	Size	User	Readability	Passive Language	Average Sentence	Long Sentences
4 versions of the same proposal						
	4 docs	fergal1@i				
	4 docs	fergal1@i				
Statistics showing improvement across versions						
RFP 3 - IN						
Vol I Tech XXX_TO4_v13....	10,275 words	fergal1@i	22	8.66%	14 words	18.76%
Vol I Tech XXX_TO4_v16....	12,856 words	fergal1@i	20	7.69%	14 words	17.37%
Vol I Tech XXX_TO4_v20....	12,419 words	fergal1@i	22	3.63%	12 words	7.27%
Vol I Tech XXX_TO4_vFIN...	13,447 words	fergal1@i	27	1.72%	10 words	6.94%

Sentence length went from 18.9% (v13) to 6.9% (vFINAL)

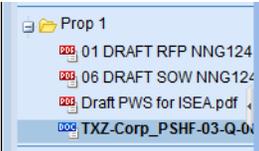
Passive language went from 8.7% (v13) to 1.7% (vFINAL)



Figure 5: Example of Plain Language Report showing progression between versions.

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your proposal documents or sections/versions of your proposal documents to the proposal folder.	Click  'Upload Documents' at top left
3. Select the proposal document in the left panel, in this case it's "TXZ-Corp...".	
4. Click on the "Clear Language" tab, you will see results similar to Figure 4	
5. If you want to share the results, click the green button that says "View PDF Report"	
6. In the "File Download" window, click "Save" and save to the location of your choice	

Related Items:



"Measure your Proposal Readability" - <https://visiblethread-1.wistia.com/medias/cfs3rtg369>



Blog Post: "The Cost of Bad Writing – Why Readability Analysis Saves Money" - <http://www.visiblethread.com/2013/05/the-cost-of-bad-writing-why-readability-analysis-saves-money/>



Blog Post: "Is poor readability killing your exec summary? 5 metrics that will fix it" - <http://www.visiblethread.com/2012/10/is-poor-readability-killing-your-exec-summary-5-metrics-that-will-fix-it/>

2.2 CHECKING ACRONYMS FOR CORRECT DEFINITIONS

Using VisibleThread During The Proposal Life Cycle

A proposal or draft snippets of the proposal will contain multiple acronyms. If a technical volume has inconsistent or undefined acronyms this will cause compliance issues. Government agencies in particular will have issues. The job of the proposal manager or volume lead is made doubly hard since every new revision will require a re-check. And time is very tight.

For an example of why this is a serious issue, here's an example of a US government contractor running afoul of the Government's requirements for clear and consistent acronym usage: [How to lose a \\$100m bid – in 3 simple steps](#).

So, manual checks are both extremely time consuming and error prone. You can run an Acronym check in minutes on any of your proposal docs with VisibleThread.

Notes:

- ◆ The You will see a report listing all acronyms in alphabetical order.
- ◆ This report flags:
 - Well-defined acronyms, meaning an acronym with a fully expanded definition alongside,
 - Acronyms with no definition, for example 'AFNIC' and 'API' are not defined in the document below,
 - Acronyms with multiple definitions, for example 'ARIN' below, and
 - Acronyms where usage occurs before the definition, for example 'ASN' below.

Using VisibleThread During The Proposal Life Cycle

Acronym Report TXZ-Corp_PSHF-03-Q-00023.doc

TXZ-Corp_PSHF-03-Q-00023.doc

Export to Excel →

Total likely acronyms: 37 unique found

Well-defined acronyms: 13 out of 37 Acronyms

Acronyms with No Definition with Multiple Definitions used before Definition: 16

Exclude acronyms from report: 8

Acronym Ignore List: 4

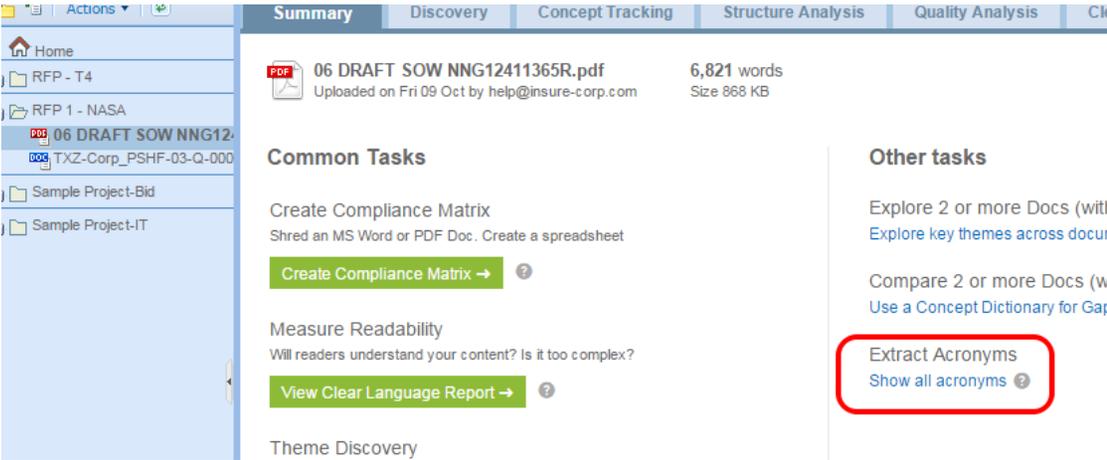
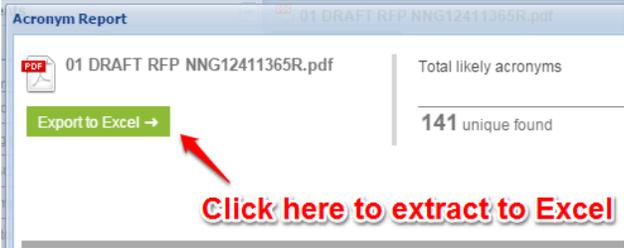
Acronym	Definition	Status	Location	1st occurrence	Count
AFNIC	-	Not defined	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Internet registry data from other registries (RIPE, AFNIC, LACNIC, etc.)	2
API	-	Not defined	6. Past Performance Information, Key Personnel	Features of the system including the retrieval of large datasets from numerous data sources, query-time information fusion into a unified response, swappable logic modules, and multiple front-end APIs.	4
ARIN	American Registry for Internet Numbers	Multiple definitions	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Internet Registry Data Near real-time access to Internet registry data from the American Registry for Internet Numbers (ARIN). Attributes from Internet registry data include the following:	2
ARIN	American Registry for Internet Numbers	Multiple definitions	6. Past Performance Information, Internet Path Project Support base Period	Internet Registry Data At a minimum, near real-time access to Internet registry data from the American Registry for Internet Numbers (ARIN). Attributes from Internet registry data include the following:	2
AS	-	Not defined	Product Description, 2. TXZ's Product Offerings, TXZTrunk	AS peering relationships	13
ASN	-	Used before definition	Product Description, 2. TXZ's Product Offerings, TXZTrunk	ASN peering relationships composed of BGP tables from 50 distinct ASN's	6
ASN	Autonomous system numbers	Multiple definitions	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Autonomous system numbers (ASNs) advertising service for each IP address range	6

Close this Report

- ◆ You can also export this to an Excel file showing the same data. Use this report to allocate responsibilities to guide the fix process.

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. Upload your proposal documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
2. Click on the "Summary" tab on right (this is the default first tab so already showing)	
3. Click the "Show all Acronyms" Button	 <p>The screenshot shows the VisibleThread interface. On the left is a navigation pane with folders like 'RFP - T4', 'RFP 1 - NASA', and '06 DRAFT SOW NNG12...'. The main area has tabs for 'Summary', 'Discovery', 'Concept Tracking', 'Structure Analysis', and 'Quality Analysis'. Under the 'Summary' tab, there's a document '06 DRAFT SOW NNG12411365R.pdf' with 6,821 words. Below this are 'Common Tasks' including 'Create Compliance Matrix' and 'Measure Readability'. On the right, under 'Other tasks', the 'Extract Acronyms' button is highlighted with a red box.</p>
4. The system will display the acronym report.	
5. Export it to Excel	 <p>The screenshot shows the 'Acronym Report' for document '01 DRAFT RFP NNG12411365R.pdf'. It displays 'Total likely acronyms' and '141 unique found'. A green 'Export to Excel' button is visible, with a red arrow pointing to it and the text 'Click here to extract to Excel' below it.</p>

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Validating acronym integrity in seconds” – <https://visiblethread-1.wistia.com/medias/efw41wb3xm>



Help File - Section 5: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

2.3 DETECTING POTENTIAL AREAS OF RISK, UNSUBSTANTIATED CLAIMS, AREAS THAT MAY REQUIRE METRICS, ETC.

Use Quality Scans to check for possible issues in the proposal. Items like liability and contract risk, clichés and professionalism, deliverability, and credibility concerns.

Using VisibleThread During The Proposal Life Cycle

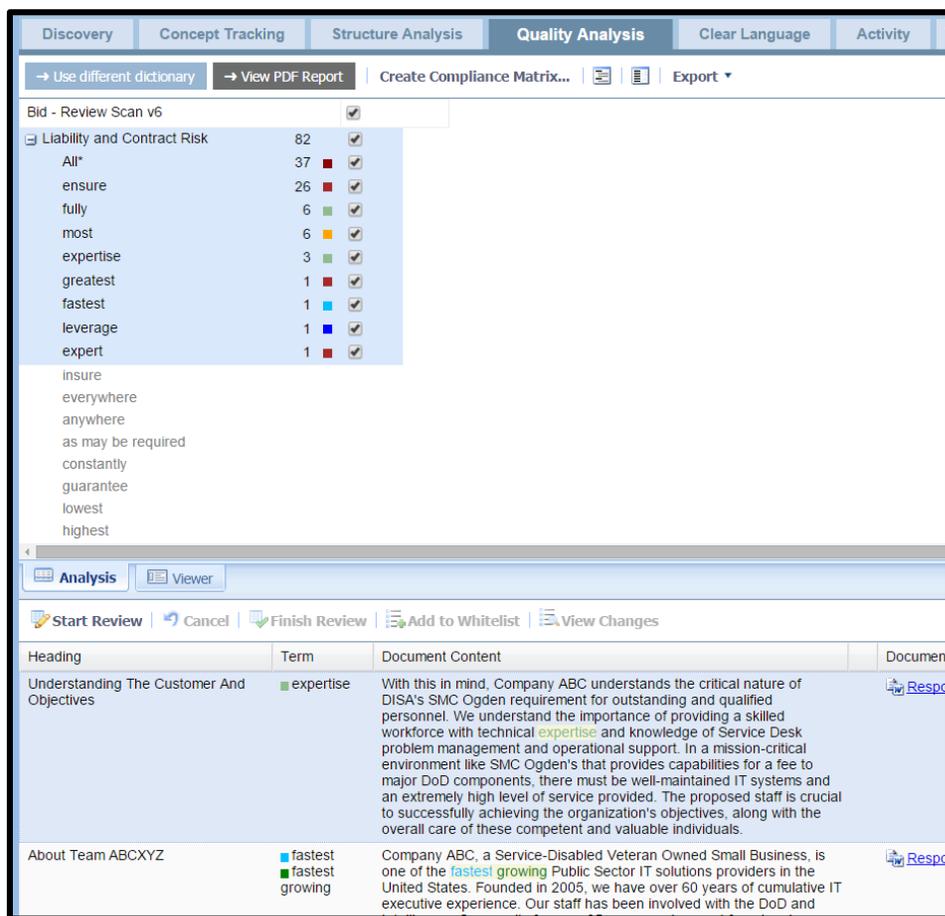


Figure 6: Sample Quality Scan

frequently, not sufficiently concrete. This is a holder for such terms. In the case of these terms, the biggest issue is difficulty in measurement and testability.

Optional: These phrases suggest doing more than what is stated.

Imprecise & Subjective: different individuals may interpret these terms differently.

Liability and Contract Risk: These are unsupported claims, superlatives, overly inclusive, unnecessarily negative, firm guarantees not required in the T&Cs. If you inadvertently make a promise or guarantee that you cannot deliver on, it exposes you to legal action or re-negotiation at a later stage. Review all statements that may involve improvable obligations or over the top assertions.

Clichés and professionalism: Trite statements and claims damage your professionalism. Review all statements and either put hard evidence from past bids to back up your claim or remove the superlatives.

Deliverability: Delivery Cost: Requirement statements that are not testable or measurable may result in unintended consequences to include product/system defects, components built outside acceptable tolerances, systems that meet the proposal guidelines, but not the intent of the SOW or RFP.

Credibility: These address groveling style statements or statements that do nothing for your argument. They have very poor tone and suggest pure waffle.

Customize Quality Scans to search for other potential areas of concern such as those below.

Unresolved: Lack of Closure: Certain phrases suggest lack of resolution in terms of statements found in documents. Documents for signoff should be free of these terms.

Measurability: These are phrases or terms that are

Using VisibleThread During The Proposal Life Cycle

Open Ended: Items such as e.g., - suggesting using an example in favor of lack of specificity and therefore missing possible scenarios that are measurable.

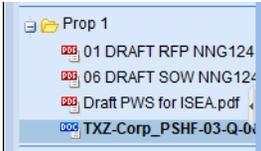
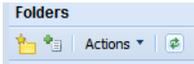
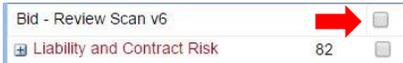
Unachievable – Too Specific: Statements that look compelling but are generally not realistic in the real world and need specific measures outlined to be testable.

Notes:

- ◆ The center panel of the Quality Analysis screen will contain information similar to the information in **Figure 6**
- ◆ The panel on the right identifies the documents and sections containing the selected terms.
- ◆ The bottom panel shows the text content from all of the documents that contain the selected terms. Click on Export to export that data to Excel.

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your Solicitation documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
3. Select the proposal document in the left panel, in this case it's "TXZ-Corp...".	
4. Click on the "Quality Analysis" tab	
5. Click "Actions" >> "Set Quality Dictionary"	Find 'Actions' on top left directly under Folders:
<p>NOTE: You can also click the "Use Different Dictionary" button under the tab.</p> 	
6. Select "Bid - Review Scan v6". This is a pre-defined "quality list" that ships with the tool.	
7. Click "Run Scan"	
8. When the scan completes, click the check-box next to "Bid – Review Scan v6"	
9. In the center panel, you will see results similar to those in Figure 6 above	
10. If you want to share the results, click the green button that says "View PDF Report"	
11. In the "File Download" window, click "Save" and save to the location of your choice	

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Red-flagging Bad Language” - <https://visiblethread-1.wistia.com/medias/5gyj84cu1x>



Blog Post: “Which words are (still) killing your proposal?” - <http://www.visiblethread.com/2011/12/which-words-are-still-killing-your-best-proposals-a-look-back-on-2011/>

2.4 DETERMINE IF CONTENT REQUIREMENTS ARE SUFFICIENTLY ADDRESSED

Use the Concept Tracking tab to confirm that you have addressed key solicitation requirements. By running a Concept Scan using a Concept Dictionary or by adding terms to a Concept Dictionary using Discovery, you can easily search for sections of your proposal that address those key words.

Notes:

- ◆ The words listed on the left side of the middle panel are key words taken from the evaluation criteria.
- ◆ The number of times the word occurs in all of the documents is listed on the right side of each word in the middle panel
- ◆ The number of times the word occurs in each document is listed below the document name in the column header
- ◆ In the example in **Figure 7**, the first document is our RFP, the second Document is our first draft of our Response and the third document is Version 2 of our Response.
- ◆ It is a good thing for the frequency of the words to as the proposal documents move toward final

FIT Affinity 2	Freq.	RFP.doc	Response V1.doc	Response V2.doc
reporting	35	3	16	16
training	24	6	9	9
Information Technology	18	10	4	4
Project Management	16		8	8
QA	12		6	6
TESTING	11	5	3	3
architecture	10		5	5
documentation	9	5	2	2
scheduling	8	2	3	3
IT services	6		3	3
configuration management	6		3	3
Quality Assurance	4		2	2
knowledge management	3	2		1
problem management system	3	2		1
change control	2		1	1
CMMI	2		1	1
CM	2		1	1
software engineering	2		1	1

Figure 7: Concept Tracking Example at Folder Level

Using VisibleThread During The Proposal Life Cycle

- ◆ From this view, the user can quickly determine that there are references to “Problem Management System” and “Knowledge Management” in the RFP documents, but no references to those terms in Version 1 of our Response. In Version 2 of our Response, we notice we have made corrections to add in those key terms to make us compliant.
- ◆ From this view, you can quickly see the reference to “Information Technology” in all three RFP documents and in our proposal
- ◆ Selecting the check boxes will give us the paragraph in the Documents of how they are used. When selected the content is viewed in a window at the bottom of your screen.

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your Solicitation documents to the proposal folder.	Click  'Upload Documents' at top left
3. Also upload your proposal documents or sections/versions of your proposal documents to the proposal folder (you probably have your docs on your hard drive or in a repository such as share point or other locations. If so, just upload them from a mapped drive.)	
4. Select the newly created proposal folder	
5. Click on the "Concept Tracking" tab	
6. Click the “Use different dictionary” button under the ‘Concept Tracking’ tab.	
	
7. Select a Concept Dictionary containing key words found in the evaluation criteria and/or RFP.	
8. In the center panel, you will see results similar to those in Figure 7 above	
9. If you want to share the detailed results, in the bottom panel, click the drop down for "Export" >> “Export to Excel”	
10. In the "File Download" window, click "Save" and save to the location of your choice	

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Validating Proposals for Section M Compliance and Win Strategies” - <http://www.youtube.com/watch?v=hYYkooQbF0M>

2.5 CONFIRM THAT PROPOSAL WIN THEMES AND DISCRIMINATORS ARE ADDRESSED

Use the Concept Tracking tab at document level to confirm that you have addressed key solicitation requirements in your proposal.

You can define a Concept List that contains win themes and discriminators. Once established, you can use it to check your proposal for adequate reference to those themes and discriminators.

Figure 8 shows examples of what might be included in a Concept List for win themes and discriminators.

Theme	Selected Terms
Theme 1 - Committing to People and Place: Show a deep commitment to XXX’s citizens and staff. Show that we have an interest in investing in the community’s economic capacity.	citizen, staff, community, economic, people, place
Theme 2 - Delivering Reliable and Efficient Services: Show that we achieve efficiency and quality, through focus on quality and the “metrics that matter”.	efficiency, efficient, reliable, services, quality, metrics, focus
Theme 3 - Providing Energy and a Capacity for Change: Show how we deliver exceptional outcomes through proven and agile service delivery.	agile, delivery, service, energy, capacity
Theme 4 - Delivering Improved Customer Service: Demonstrate that we meet and exceed customers’ expectations.	customer, exceed, expectation, improved
Theme 5: Making Informed Decisions: Show how we empower professionals and customers through effective use of business intelligence.	business intelligence, effective, empower, empowering, informed, decisions

Figure 8: Types of Terms Used in a Concept List for Win Themes and Discriminators

Notes:

Using VisibleThread During The Proposal Life Cycle

- ◆ The center panel shows the number of hits for each of the terms in the Concept List, categorized by theme.
- ◆ The right panel shows the proposal document that was included in the scan and can be expanded to show the outline of that document
- ◆ As you click on the check-boxes next to the “Freq” column in the center panel, the right panel will also color code the sections that contain the terms found during the scan
- ◆ You can export the information in the bottom panel to a Microsoft Excel file

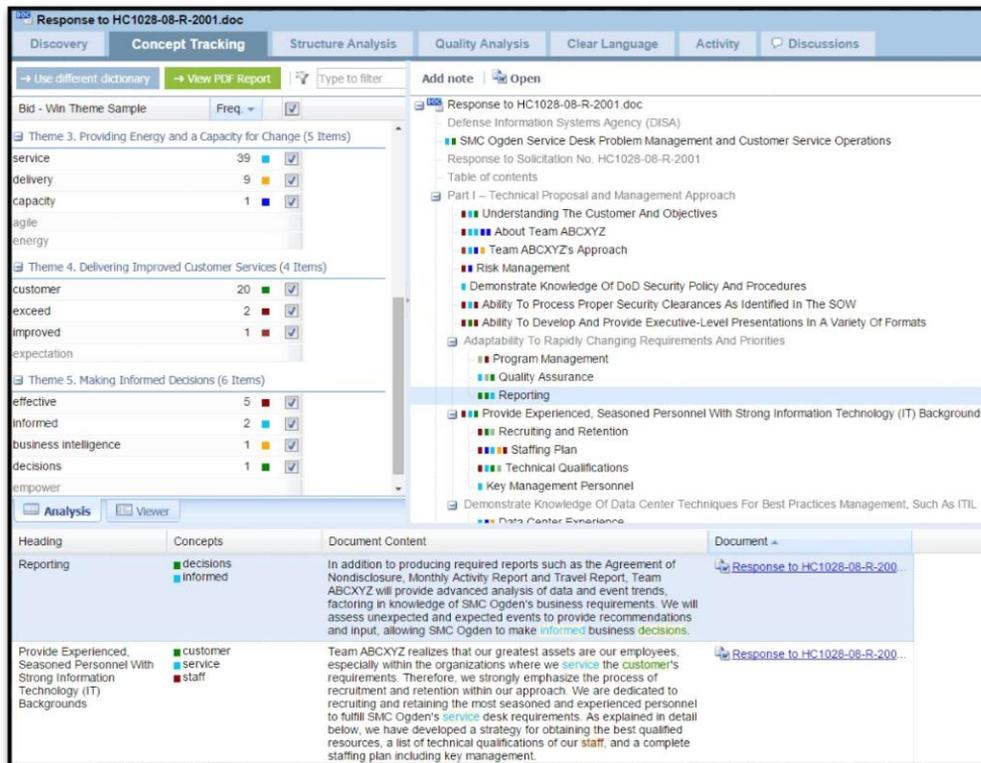
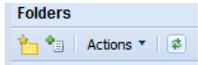


Figure 9: Sample Win Theme

VisibleThread Steps

Using VisibleThread During The Proposal Life Cycle

1. Step	Notes
2. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
3. Upload your proposal documents or sections/versions of your proposal documents to the proposal folder.	Click  'Upload Documents' at top left
4. Select the proposal document in the left panel, in this case it's "Response to HC...".	
5. Click on the "Concept Tracking" tab	
6. Click the "Set Different Dictionary" button under the 'Concept Tracking' tab. 	Find 'Actions' on top left directly under Folders: 
7. Choose the "Bid – Win Theme Sample" Concept List and click on "Run Scan".	
8. The screen will look similar to the information in Figure 9	

Related Items:



"Validating Proposals for Section M Compliance and Win Strategies" - <http://www.youtube.com/watch?v=hYYkooQbF0M>

2.6 VERIFY COMPLIANCE TO STRUCTURE OUTLINES

The Structure tab shows the headings in a document compared with an established outline.

Using VisibleThread During The Proposal Life Cycle

Use the Structure tab to enforce consistent structures across documents. Inconsistent structures may not be obvious if looking at a document in isolation.

A “Structure Outline” is a table of contents.

To create a Structure Outline, you create Categories (first level outline structure) and Child Categories (lower level outline structures). Designate categories as mandatory or not mandatory.

After creating a Structure Outline, run a Structure Outline Analysis scan on a proposal document to determine if the outline of the proposal document conforms to the established Structure Outline. The tool allows you to import a Structure Outline from a Microsoft Word document. It also allows the user generate a new MS Word document based on a predefined Structure Outline. **Figure 10** shows a sample VisibleThread structure outline.

Category	Is Mandatory?	Description
Table of Contents	Mandatory	
List of Exhibits	Mandatory	
Introduction	Mandatory	
Corporate History and Statistics	Mandatory	
1.0 Factor 1.0 – Strategy for Supporting XXX Hardware and Software	Mandatory	
1.1 Subfactor 1.1 – Technical Knowledge	Mandatory	
1.1.1 Transporting and Shipping	Mandatory	
1.1.2 Reports	Mandatory	
1.1.3 Deliverables and Schedules	Mandatory	
1.1.4 Contractor Furnished Property and Services	Mandatory	
1.2 Subfactor 1.2 – Subcontract Management	Mandatory	

Figure 10: Sample Structure Outline

Notes:

- ◆ At the folder level, you can view structure compliance of a single document, multiple documents, or multiple versions of documents as shown in **Figure 11**.
- ◆ Another Example: Suppose your organization has a standard quality plan and every proposal must include some or all elements of that quality plan. You could establish a Structure Outline for the standard quality plan and exclude the elements not needed, create a Microsoft Word document containing the modified outline, and continuously check the structure of your proposal document to make sure that it is compliant with the established outline.
- ◆ Structure only applies to MS Word files. The tool uses the ‘styles’ in MS Word to determine the heading hierarchy. Technically PDFs have no concept of heading styles, so the structure view is not relevant to PDFs.

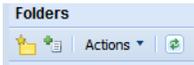
Folder / Document / Heading	Structure Outline	Size	Structure Compliance
Paul (Versions 2)	Paul (Structure)	7 docs	69%
v01.docx	Paul (Structure)	246 words	20%
v08.docx	Paul (Structure)	6,336 words	51%
v16.docx	Paul (Structure)	8,910 words	64%
v24.docx	Paul (Structure)	9,121 words	77%
v32.docx	Paul (Structure)	9,794 words	83%
v40.docx	Paul (Structure)	9,820 words	93%
v45.docx	Paul (Structure)	9,878 words	100%

Figure 11: Sample Structure Outline Statistics at folder level

Using VisibleThread During The Proposal Life Cycle

- ◆ There are some predefined outlines that ship with the tool but you will likely want to create your own from an existing format. See this support article on how to create your own structure outlines: <http://support.visiblethread.com/entries/22143892-Tip-Have-an-existing-MS-Word-doc-3-simple-steps-to-create-a-new-Structure-Outline-from-it->

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your Proposal documents to the proposal folder. These will be MS Word files. You can upload multiple versions of a given document, OR different sections of the proposal perhaps authored by different SMEs.	Click  'Upload Documents' at top left
3. To see an overview of structure compliance, select the newly created proposal folder	
4. Click on the "Structure Analysis" tab	
5. Click "Actions" >> "Run Structure Outline Analysis"	Find 'Actions' on top left directly under Folders: 
6. Select one of the 'structure outlines' you see. There are some predefined outlines that ship with the tool but you will likely want to create your own from an existing format. See this support article on how to create your own structure outlines from preexisting MS Word files: http://support.visiblethread.com/entries/22143892-Tip-Have-an-existing-MS-Word-doc-3-simple-steps-to-create-a-new-Structure-Outline-from-it-	
7. Review results under the "Structure Analysis" tab	
8. Next you can compare the specific outline against a given doc by selecting the document in the left hand panel, and looking at the content contained in the 'Structure Analysis' tab.	

Using VisibleThread During The Proposal Life Cycle

Related Items:



See this support article on how to create your own structure outlines from preexisting MS Word files:

<http://support.visiblethread.com/entries/22143892-Tip-Have-an-existing-MS-Word-doc-3-simple-steps-to-create-a-new-Structure-Outline-from-it->

2.7 REVIEW TREND FOR PROPOSAL QUALITY STATISTICS OVER TIME (QUALITY HITS, CONCEPT HITS, PLAIN LANGUAGE STATISTICS)

As you upload more documents, you will want to track their statistics over time.

Here is the list of statistics available at folder summary view:

Word Count: Number of total words in the documents

Quality Hits: The Quality Analysis statics show the quality assessment for all documents (in the folder) rated against the current Quality Practice. The Quality Practice consists of sets of categorized quality terms or expressions that if found suggest ambiguity or lack of specification. In essence, identification of such phrases introduces risk into the program/project.

Concept Hits: Concept tracking explicitly tracks against a predefined set of terms/phrases. Similar to Quality Practices, VisibleThread maintains Concept Lists in the Reference Practices area, similar to Quality Practices. Use a Concept List to define in terms in win themes and discriminators. Run a Concept Scan using the Concept list to check your proposal for adequate reference to the win themes and discriminators. A Concept List defined with collections of technical concepts / terms / keywords that you expect to see in your proposal.

Plain Language Statistics:

- ◆ **Passive Language:** These are sentences where the subject acted upon appears before the verb. “Quality is monitored” vs. “We monitor quality”. If you use active voice, you will increase clarity and strength. You will also flush out the “actor”, i.e., who did the action?
- ◆ **Long Sentences:** These are sentences greater than 25 words. The threshold can be set to a value of your choice. Long sentences mask multiple concepts. Shorten sentences to provide a clearer message.
- ◆ **Hidden Verbs:** We call verbs presented in a noun form, “hidden verbs”. You can often simplify hidden verbs. For example, “Please make and application” vs. “Please apply”. The hidden verb is “application” in the first example. Besides making it clearer, you also reduce work count by removing hidden verbs.

Notes:

Using VisibleThread During The Proposal Life Cycle

- ◆ **Figure 8** shows statistics from seven versions of a proposal as they progressed through the proposal development process.
- ◆ The Size column shows the number of words in the file and the size of the file
- ◆ The Quality column shows the number of hits found in the documents for: Liability and Contract Risk, Clichés and Professionalism, Deliverability, and Credibility.
- ◆ The Concepts column shows the number of hits found in the documents from key nouns found in the evaluation criteria of the solicitation. As the document gets closer to final, these hits should increase. The application allows you to adjust the thresholds for passive and long sentences.
- ◆ The Plain Language column identifies the number of passive sentences and the number of long sentences in each document. Both should decrease as the document gets closer to final and after a document has been through a technical edit.
- ◆ The Plan Language column can also help you to prioritize which sections of your proposal are highly in need of a technical edit and/or identify inexperienced writers

Summary	Discovery	Structure Analysis	Quality Analysis	Concept Tracking	Activity	Discussions
Folder Test Language contains 7 documents, no comments						
Uses concept list Test L&M						
Created Thu 06 Jun by you						
		Size	Quality	Concepts	Plain Language	
 v01.docx Added Thu 06 Jun by you		246 words Size 77 KB	- Bid - Review Scan v6	22 hits found Test L&M	3.03% passive sentences 1 of 33 sentences	6.06% sentences too long 2 of 33 sentences
 v08.docx Added Thu 06 Jun by you		6,336 words Size 68 KB	49 hits found Bid - Review Scan v6	503 hits found Test L&M	8.64% passive sentences 45 of 521 sentences	11.52% sentences too long 60 of 521 sentences
 v16.docx Added Thu 06 Jun by you		8,910 words Size 86 KB	67 hits found Bid - Review Scan v6	665 hits found Test L&M	7.44% passive sentences 54 of 726 sentences	11.57% sentences too long 84 of 726 sentences
 v24.docx Added Thu 06 Jun by you		9,121 words Size 80 KB	73 hits found Bid - Review Scan v6	681 hits found Test L&M	5.45% passive sentences 41 of 752 sentences	11.44% sentences too long 86 of 752 sentences
 v32.docx Added Thu 06 Jun by you		9,794 words Size 84 KB	74 hits found Bid - Review Scan v6	734 hits found Test L&M	5.82% passive sentences 47 of 808 sentences	11.26% sentences too long 91 of 808 sentences
 v40.docx Added Thu 06 Jun by you		9,820 words Size 83 KB	77 hits found Bid - Review Scan v6	728 hits found Test L&M	4.46% passive sentences 36 of 807 sentences	11.77% sentences too long 95 of 807 sentences
 v45.docx Added Thu 06 Jun by you		9,878 words Size 90 KB	73 hits found Bid - Review Scan v6	737 hits found Test L&M	4.63% passive sentences 38 of 820 sentences	11.83% sentences too long 97 of 820 sentences

Using VisibleThread During The Proposal Life Cycle

Figure 12: Statistics from Various Versions of Proposal Files

VisibleThread Steps

Step	Notes
1. In VisibleThread, create a folder to hold your proposal documents	Click  'New Folder' at top left
2. Upload your proposal documents or sections/versions of your proposal documents to the proposal folder.	Click  'Upload Documents' at top left
3. Select the newly created proposal folder	
4. Click on the "Summary" tab to display statistics about your proposal documents	
5. In the center panel, you will see results similar to those in Figure 12 above	

2.8 SEARCHING FOR QUALIFICATIONS ACROSS RESUMES OR CVs

Proposal Managers must identify the most qualified candidates to bundle with the proposal. Searches for security clearance and technical capabilities can be very time consuming. Who has PMI certification? who has done agile projects? Who has security clearance levels or TSI?

You can check qualifications in a few minutes very easily, and save a lot of time.

Notes:

- ◆ Using folder views allow you search for qualifications across multiple docs very quickly.
- ◆ Here is a view showing a number of candidate resumes. We can easily see:
 - Who is most qualified
 - Who should be eliminated for consideration

Using VisibleThread During The Proposal Life Cycle

All Resumes

Resume Checker - Security and Te... Freq. Arnold L... Bertram... Blanche... Cabrey... Camero... Daniel... Eugene... Frank W...

	Arnold L...	Bertram...	Blanche...	Cabrey...	Camero...	Daniel...	Eugene...	Frank W...
1. Security (17 Items)								
Security	28		1	6	8		6	7
SECRET	7		1	1	3		1	1
Clearance	5		1	1	1		1	1
classified	5			1	4			
TOP SECRET	5			1	2		1	1
years	5		1		1	1	2	
SCI	4			1	1		1	1
Confidential	1				1			
SSBI	1						1	
TS/SCI								
SPI								
SAP								
OCI								
SCIF								
FCL								
NCS								
citizen								
2. Program Management (7 Items)								
years	5		1		1	1	2	
Agile	1					1		
PMP	1						1	
ISO*								

Lack of quals

Worth digging into

- ◆ You can also export this to an Excel file showing the same data.
- ◆ You can also drill into individual resumes for further analysis.

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
1. Upload your resumes to a folder.	Click  'Upload Documents' at top left
2. With the folder selected on the left, click on the "Concept Tracking" tab on right	
3. Click Use different dictionary to choose your qualification dictionary.	
4. This will show you all the resumes, with the qualifications	
5. The system will display the qualifications cross referenced with the resumes.	
6. Export it to Excel if needed	

Related Items:



“Using Discovery for Resume Qualification Checking” – <https://visiblethread-1.wistia.com/medias/4otumxk6c4>



Help File - Section 7.6: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

3.0 POST RED TEAM REVIEW

3.1 CREATE AN ACRONYM LIST

It is very easy to create a final acronym list.

You can run an Acronym check in seconds on any of your proposal docs and generate the final list. You can also check for compliance issues with acronyms.

Notes:

Using VisibleThread During The Proposal Life Cycle

- ◆ You will see a report listing all acronyms in alphabetical order.
- ◆ This report flags:
 - Well-defined acronyms, meaning an acronym with a fully expanded definition alongside,
 - Acronyms with no definition, for example 'AFNIC' and 'API' are not defined in the document below,
 - Acronyms with multiple definitions, for example 'ARIN' below, and
 - Acronyms where usage occurs before the definition, for example 'ASN' below.

Acronym Report TXZ-Corp_PSHF-03-Q-00023.doc

Export to Excel →

Total likely acronyms: 37 unique found

Well-defined acronyms: 13 out of 37 Acronyms

Acronyms with No Definition: 16

Acronyms with Multiple Definitions: 8 Exclude acronyms from report

Acronyms used before Definition: 4 Acronym Ignore List

Acronym	Definition	Status	Location	1st occurrence	Count
AFNIC	-	Not defined	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Internet registry data from other registries (RIPE, AFNIC, LACNIC, etc.)	2
API	-	Not defined	6. Past Performance Information, Key Personnel	Features of the system including the retrieval of large datasets from numerous data sources, query-time information fusion into a unified response, swappable logic modules, and multiple front-end APIs.	4
ARIN	American Registry for Internet Numbers	Multiple definitions	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Internet Registry Data Near real-time access to Internet registry data from the American Registry for Internet Numbers (ARIN). Attributes from Internet registry data include the following:	2
ARIN	American Registry for Internet Numbers	Multiple definitions	6. Past Performance Information, Internet Path Project Support Base Period	Internet Registry Data At a minimum, near real-time access to Internet registry data from the American Registry for Internet Numbers (ARIN). Attributes from Internet registry data include the following:	2
AS	-	Not defined	Product Description, 2. TXZ's Product Offerings, TXZTrunk	AS peering relationships	13
ASN	-	Used before definition	Product Description, 2. TXZ's Product Offerings, TXZTrunk	ASN peering relationships composed of BGP tables from 50 distinct ASNs	6
ASN	Autonomous system numbers	Multiple definitions	Product Description, 2. TXZ's Product Offerings, TXZTrunk	Autonomous system numbers (ASNs) advertising service for each IP address range	6

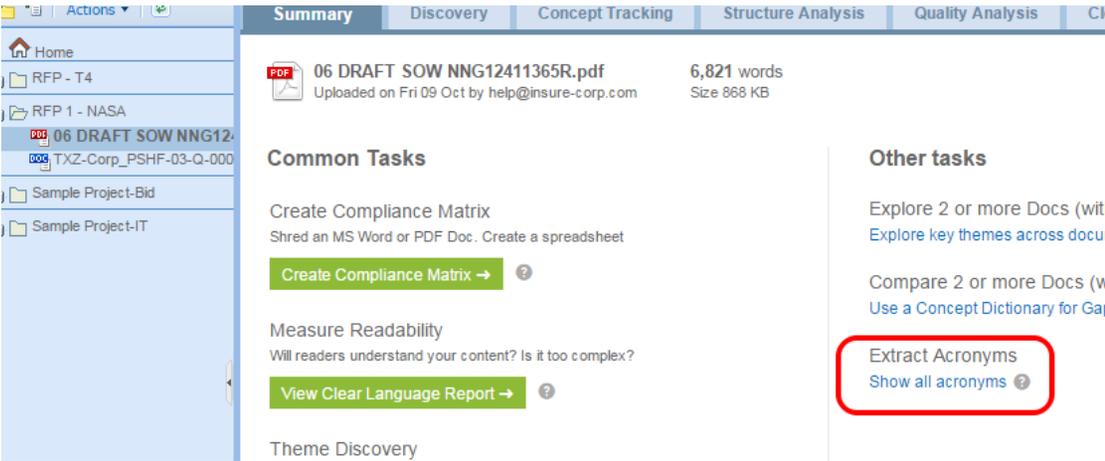
Close this Report

- ◆ You can also export this to an Excel file showing the same data. Use this report to allocate responsibilities to guide any identified last minutes fixes.

Using VisibleThread During The Proposal Life Cycle

Using VisibleThread During The Proposal Life Cycle

VisibleThread Steps

Step	Notes
7. Upload your proposal documents to the proposal folder. These can be either MS Word, PDF or Excel files.	Click  'Upload Documents' at top left
8. Click on the "Summary" tab on right (this is the default first tab so already showing)	
9. Click the "Show all Acronyms" Button	
10. The system will display the acronym report.	
11. Export it to Excel	

Using VisibleThread During The Proposal Life Cycle

Related Items:



“Validating acronym integrity in seconds” – <https://visiblethread-1.wistia.com/medias/efw41wb3xm>



Help File - Section 5: <http://support.visiblethread.com/entries/22096143-VisibleThread-for-Docs-help>

3.2 CHECK FOR CONTENT LOSS AFTER CUTTING MATERIAL TO MEET PAGE LIMITATIONS

Use established Concept Lists to make sure that you have not lost valuable content such as sufficient response to evaluation criteria; win themes, discriminators, etc.

3.3 USE DISCOVERY TO ASSIST WITH BUILDING A PROPOSAL CROSS-REFERENCE MATRIX

VisibleThread does not build a proposal cross-reference matrix for you. However, It can assist you with locating/verifying where information is referenced in your proposal, helping you to build your proposal cross-reference matrix. For example: Suppose you wanted to know every place in the proposal where you discussed personnel, qualifications, experience, and certifications. In the Discovery tab, you could enter those four (4) words and the results would be all sections of the proposal that contain those terms.

Note:

- ◆ The center panel shows all of the nouns that are contained in your document
- ◆ The right panel shows the outline for your document (sections and subsections)
- ◆ The bottom panel shows an extract of every location in your document containing the specified term(s)
- ◆ When you check the box next to a term, the right panel is annotated to show which sections in the document contain the term(s)
- ◆ When you click on the section of the document containing the term(s), the bottom panel is then populated with the text from that section that contains the term(s)
- ◆ In the bottom panel, click on Export to export that data to Excel

Using VisibleThread During The Proposal Life Cycle

3.3 CONFIRM INTEGRITY OF OUTLINE

Run a Structure Scan to verify that the proposal outline does has not deviated from the established outline. Please refer to Section 2.1 for more details on verifying proposal outline structures.

4.0 POST-PROPOSAL SUBMITTAL

4.1 FINAL PROPOSAL REVIEWS (FPRs)

Final proposal reviews typically require searching the proposal for information necessary to respond to the Government's questions. Individuals are no longer intimately familiar with the proposal content. Finding the necessary information requires that sections of the proposal be perused. More than likely, you will base the sections you choose to analyze what is determined to be relevant by reviewing the table of contents of relevant volumes. It is easy to overlook relevant information using this method.

Using the Discovery Tab, VisibleThread provides an easy method to quickly search for all occurrences of relevant information across all proposal documents. All of the information is available for review on a single screen and is exportable to Excel. For example, you might want to know everywhere in the proposal that 'management' is discussed. You can either search in the "Topics Found" highlighted in the top right of **Figure 14** or search in the "Type to Filter" area, also highlighted. Notice, we have two compliance gaps for the phrases we have selected.

The screenshot displays the VisibleThread RFP Comparison tool interface. The 'Discovery' tab is active, and the search filter is set to 'management'. The main table shows the following data:

Topic Detail	Topic	Freq.	RFP.doc	Respo...
Personnel Management	managem...	1	1	
PMI's Project Management Processes	managem...	1		1
problem management system	managem...	1	1	
program management oversight, communica...	managem...	1		1
program management system	managem...	1		1
project management	managem...	1		1
project management controls	managem...	1		1
project management processes	managem...	1		1
project schedule and project management	managem...	1		1
quality management	managem...	1		1
SMC Ogden Trouble Management System	managem...	1	1	
systems management	managem...	1		1
technical disciplines and management appro...	managem...	1		1
Technical Support staff or management	managem...	1	1	
travel expenses, management support	managem...	1		1
Trouble Management System	managem...	1	1	

The 'Topics found (1396)' sidebar on the right lists the following topics and counts:

Topic	#
contract	134
contractor	123
Government	102
performance	96
information	85
Security	80
Service	79
management	75
cost	67
Offeror	66
Team	60
business	54
Officer	53
requirements	47
Services	46
II	44

The 'Checked topics' section at the bottom right shows:

Checked topics	Count	Doc
Build draft ...	1	x
problem m...	1	x
Trouble Ma...	1	x

The document content snippet below the table shows a requirement for a problem management system:

5.1 This requirement is for Level II positions. Servicing a diverse and complex customer base requires an effective problem management system to capture, diagnose, and resolve the variety of complex, system related problems emanating from a wide variety of hardware, system related problems emanating from a wide variety of hardware and software operating systems and applications. The SMC Ogden Service Desk is on the cutting edge of the problem management system and provides the customers a single point of contact for troubleshooting and resolution for problems associated with data networks, computer configurations, and application software assigned to the SMC. In-depth knowledge of mainframe operating systems, mid-tier operating systems, Windows server systems, personal computer (PC) and web applications are required.

Figure 14: Sample Use of Discovery for Searching Hardware and Software Maintenance

4.2 DEBRIEF ANALYSIS

Similar to the discussion about FPRs in Section 4.1, the Discovery tab can also be used for performing the same sort of research when analyzing a proposal based on information provided in a Government debrief.

The techniques described in Sections 2.2, 2.3 can also be beneficial in determining how well you did, or did not cover specific requirements in the RFP. Reuse of the Concept Lists created for the development of the proposal will benefit this analysis task.

Using VisibleThread During The Proposal Life Cycle

5.0 CAPTURE

5.1 HELP DETERMINE BID / NO-BID DECISIONS

While not part of the proposal development cycle, VisibleThread is also used to help Capture and Sales professionals qualify opportunities. Here is a video outlining how.



“Scanning RFPs to help make Bid / No-bid decisions” - <http://www.youtube.com/watch?v=mngX9y49EvA>

The screenshot shows the VisibleThread software interface. It features a table with columns for 'Team', 'Proj.', 'Q1 2014', 'Q2 2014', 'Q3 2014', 'Q4 2014', and 'Revenue'. The table lists various RFPs with their respective values and status indicators. A pie chart is overlaid on the table, showing a distribution of data across the quarters. The interface also includes tabs for 'Summary', 'Discovery', 'Structure Analysis', 'Quality Analysis', and 'Concept Tracking'.

Team	Proj.	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Revenue
Contractor	748	100	100	100	100	100
Contract	100	100	100	100	100	100
Government	428	100	100	100	100	100
Industry	100	100	100	100	100	100
Private	301	100	100	100	100	100
Other	200	100	100	100	100	100
Non	100	100	100	100	100	100
Joint	100	100	100	100	100	100
USCA	100	100	100	100	100	100
International	100	100	100	100	100	100
Performance	100	100	100	100	100	100