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Applying *Agile* to the Shipley Framework

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WHAT IS AGILE?

*"Ultimately, **Agile is a mindset** informed by the Agile Manifesto's values and principles. Those values and principles provide guidance on how to create and respond to change and how to deal with uncertainty."*

"Agile is the ability to create and respond to change. It is a way of dealing with, and ultimately succeeding in, an uncertain and turbulent environment."

www.agilealliance.org

Agile Methodologies

What are Agile Methodologies?

If Agile is a mindset, then what does that say about the idea of Agile methodologies?

Alistair Cockburn suggested that *a methodology is the set of conventions that a team agrees to follow*.

So *Agile* methodologies are the conventions that a team chooses to follow in a way that follows *Agile* values and principles."

Source: The Agile Alliance

Agile's 12 Principles Apply to Business Development (BD)

We must stay customer-centric in all business winning activities

1. Place the **customer at the center of all business development (BD) activities** and consider high levels of customer satisfaction to be an ongoing strategic objective of the organization.

2. Be proactive in identifying and embracing changing customer requirements and perspectives throughout the BD lifecycle.

3. Deliver proposal content incrementally in shorter bursts rather than in a single larger (higher-risk) delivery.

4. Maintain close contact with internal and external stakeholders throughout the BD lifecycle.

5. Ensure BD teams have the working environment and support they need to achieve results.

6. Prioritize regular face to face or virtual BD discussions over other forms of communication in order to ensure common understanding.

7. Winning profitable and deliverable work is the primary measure of BD success.

8. Apply shorter burst "sprints" with fixed milestones to support pace and productivity.
Review content in parallel.

9. Keep solution and proposal design as modular as possible to support re-use and rapid re-configuration.

10. Remove BD activities that do not either:
- Increase probability of win (Pwin);
- Reduce organizational risk or costs; or
- Support sustainability.

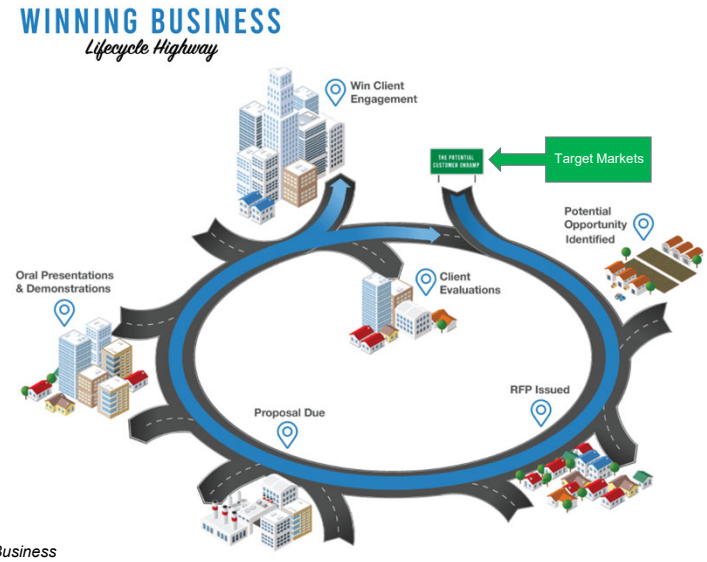
11. Encourage high-performing teams to **self-organize** for maximum effectiveness.

12. Hold **Lessons Learned Reviews** at the end of each major Business Development phase, to include a consideration of team behaviors and dynamics.

The Shipley Framework

A phased, iterative approach to winning

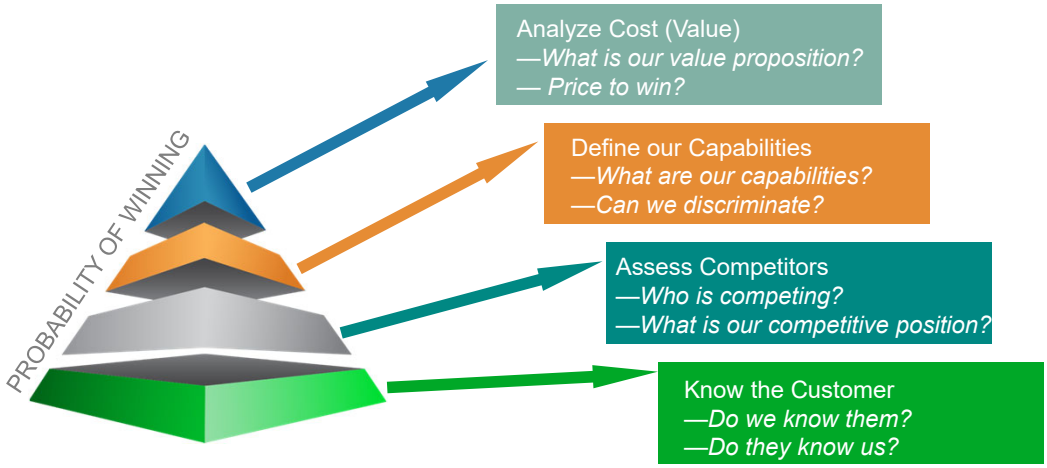
APMP's Winning Business Lifecycle Highway



Source: APMP *Winning the Business*

Any Framework Must Focus on P*win*

Probability of winning needs to be the centerpiece of any pursuit



ShipleyAssociates
www.shipleywins.com

Shipley Business Development Lifecycle™

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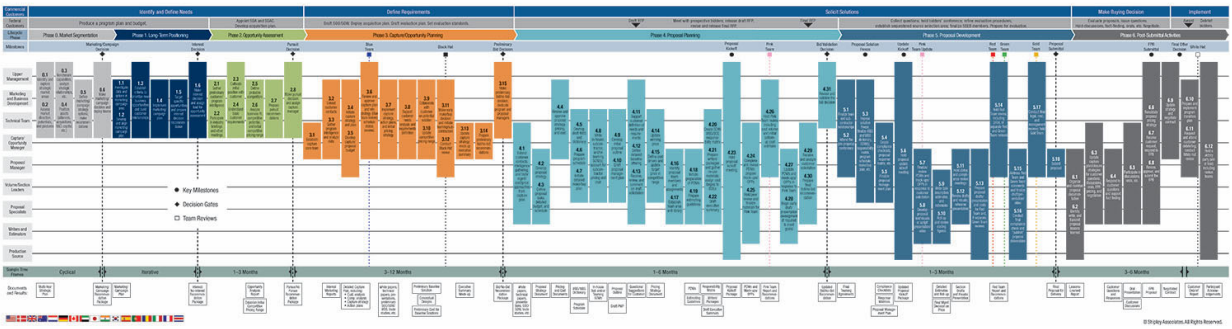


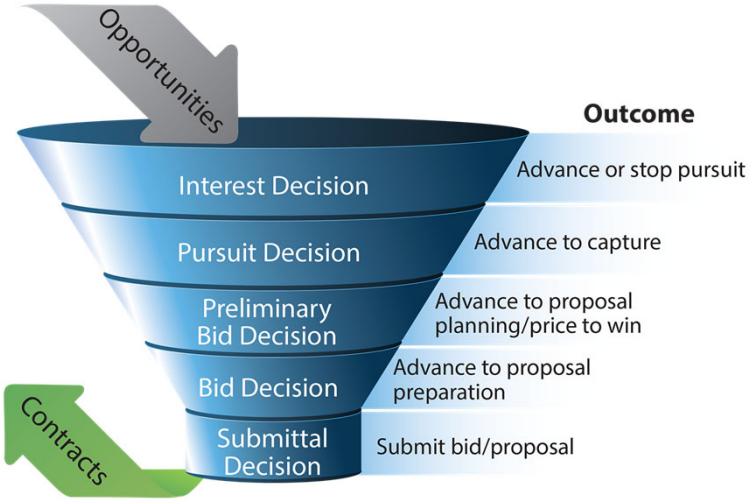
- A baseline framework ("convention") based on industry best practice
- Designed to be cyclical, tailorable, scalable, and flexible
- Assumes key business phases, parallel tasks, and critical decision-making milestones
- Encourages daily engagement with key stakeholders and contributors

"The Shipley lifecycle is much more than a proposal approach. I've built my successful business on these phases, decision gates, milestone activities, and deliverables."

- Mid-size business owner

Key Decisions/Outcomes throughout the Lifecycle

Can we compete? Should we compete? Can we win?



Qualification and Strategy Reviews are Ongoing

DECISION

Yes? *No?*

- **Advance** — -Secure funding -Commit staff -Track results
- Archive decision package
- **Defer** — -Set schedule -Identify contingencies
- Document lessons learned
- **End** — -Redirect resources

Each Phase includes Tasks, a Decision Gate, Deliverables, & Reviews

These milestones must be flexible and scalable in an Agile environment

Decision Gates

Purpose: To make decisions regarding allocation of company resources and pursuit readiness

- ✓ Led by leadership stakeholders
- ✓ Address business and strategic issues
- ✓ Limited outcomes (advance, end, or defer)
- ✓ Team executes the decision outcomes

Team Reviews

Purpose: To improve quality of the bid or proposal (message and strategy)

- ✓ Careful selection of review team; parallel, frequent reviews encouraged
- ✓ Address tactical and execution issues
- ✓ Variety of outcomes (qualitative and quantitative)
- ✓ Staff and peers execute outcomes

Sample Pursuit Decision Checklist

Do we have adequate resources to aggressively develop the opportunity?

Might the opportunity require teaming?

Are there acceptable profit margins or other strategic reasons for wanting to win?

Do we know the key decision makers and their issues and hot buttons?

Do the key customer stakeholders know us?

Do we have a clear understanding of our anticipated role?

Are there any potential conflicts of interest for us?

Have we identified probable competitors?

Have we gathered evidence and impact of the need or problem?

Will customer's likely requirements match our competencies?

Do we have a baseline solution aligned to the price to compete?

Two Types of Reviews

Daily reviews occur between key milestone reviews

Daily Reviews (Scrum)

Key Milestone Reviews (color team)

Daily Stand-Up Meetings/Reviews

Daily/regular stand-ups occur between key milestone reviews

- Keep short but be thorough
- Review assigned tasks, commitments, and status
- Identify any issues or “blockers”
- Determine path forward and schedule
  - Need for SME support
  - Reuse material
- Establish commitments and deadlines
- Collaborate, as needed
- Prepare for milestone review

Proposal Milestone Team Reviews

Adapt and flex your approach

PREPARE	CONDUCT	RESPOND
✓ Adapt to environment	✓ Virtual, in-person, blended	✓ Debrief team
✓ Plan and schedule tasks	✓ Regular, daily	✓ Support team
✓ Deploy technology	✓ Review individually and with team	✓ Distribute or post updates and recommendations
✓ Train contributors	✓ Discuss	✓ Archive materials
✓ Provide clear guidance	✓ Report	✓ Execute, verify, learn (retrospective)

Make reviews regular, positive, and constructive.

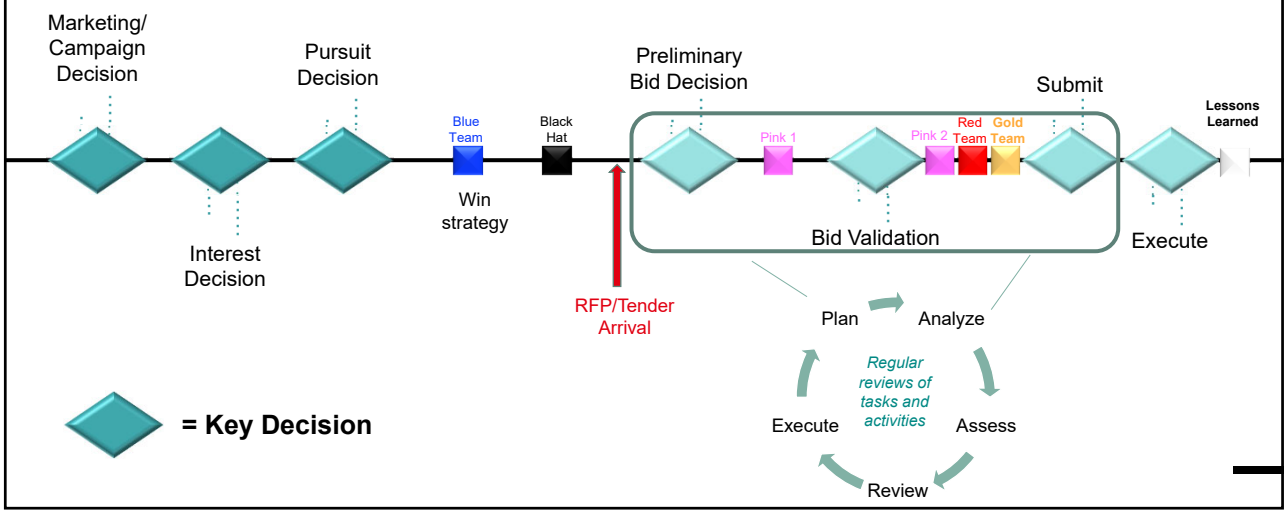
Aligning *Agile* Stages with Color Team Reviews

Retrospective reviews at each stage

Agile Project Stages	Proposal Milestones
In Stage 1, the product owner identifies the product vision.	Blue Team – **Capture Manager (Opportunity owner)** shares win strategy
In Stage 2, the product owner creates a product **roadmap**.	Proposal "owner" establishes core team and milestones – Kickoff
In Stage 3, the product owner creates a release plan.	Proposal "owner" publishes schedule and assignments – Kickoff
In Stage 4, the product owner, the master, and the development **team** plan sprints, also called **iterations**, and start creating the product within those sprints.	Pink Team Milestone – First iteration of draft sections, themes, **win strategies**, and messaging
In Stage 5, during each sprint, the development **team** has **daily meetings.**	Daily/regular status or stand-up meetings
In Stage 6, the **team** holds a **sprint review.** In the sprint review, at the end of every sprint, you demonstrate the working product created during the sprint to the product stakeholders.	Red Team Milestone Review – Final draft review for consistency, compliance, competitive focus – **proposal quality**
In Stage 7, the **team** holds a **sprint retrospective.** The sprint retrospective is a meeting where the team discusses how the sprint went and plans for improvements in the next sprint.	White Hat / Lessons Learned review. Document successes and areas for improvement

Key Milestone Decisions & Reviews

The progression is iterative and flexible

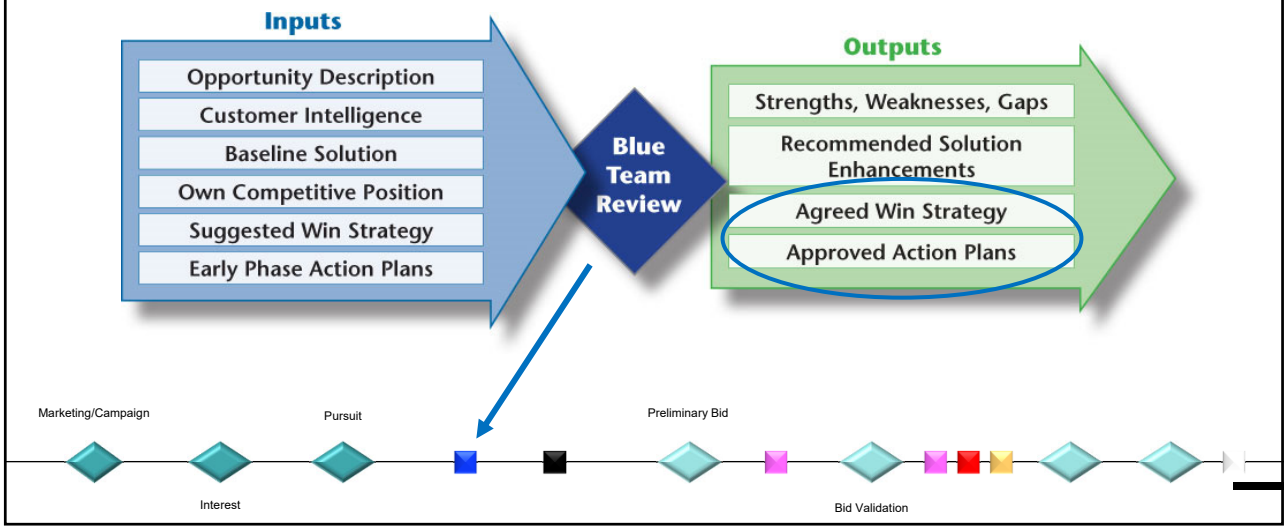


COMMON PITFALLS WITH TEAM REVIEWS

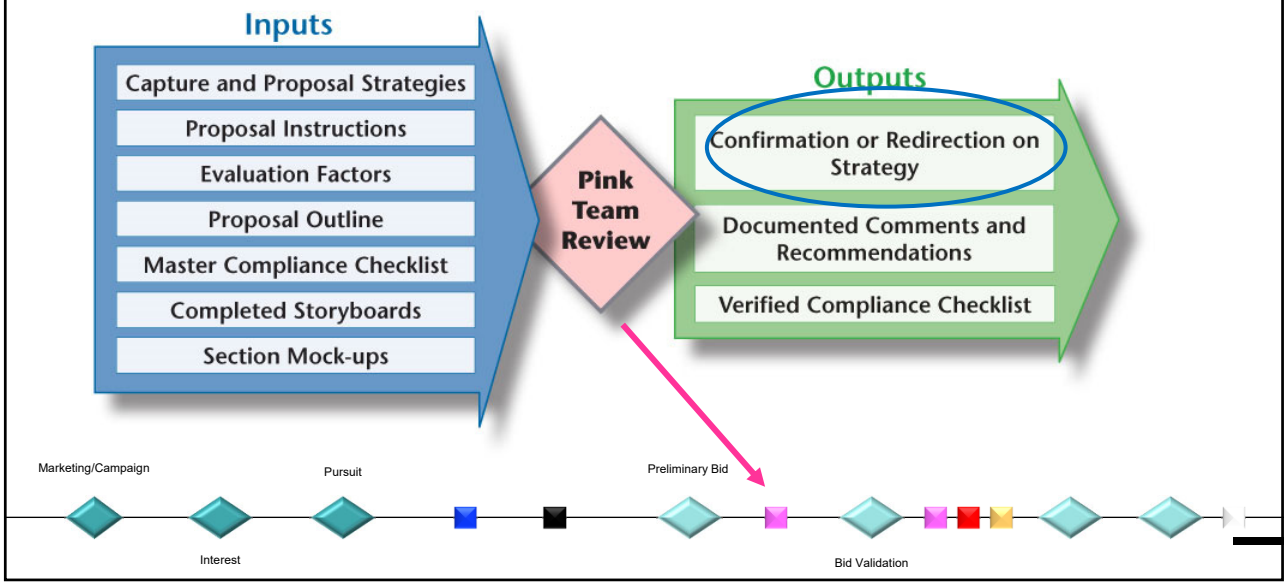
"If you can't measure it, you can't manage it."

- Peter Drucker

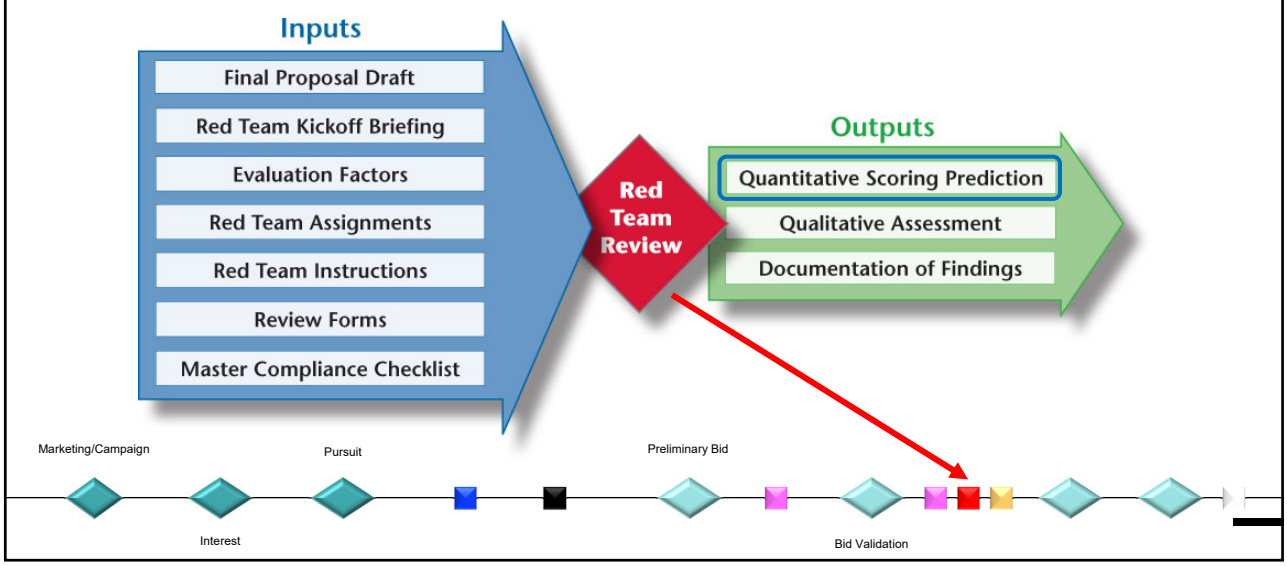
Blue Team (Win Strategy) Review



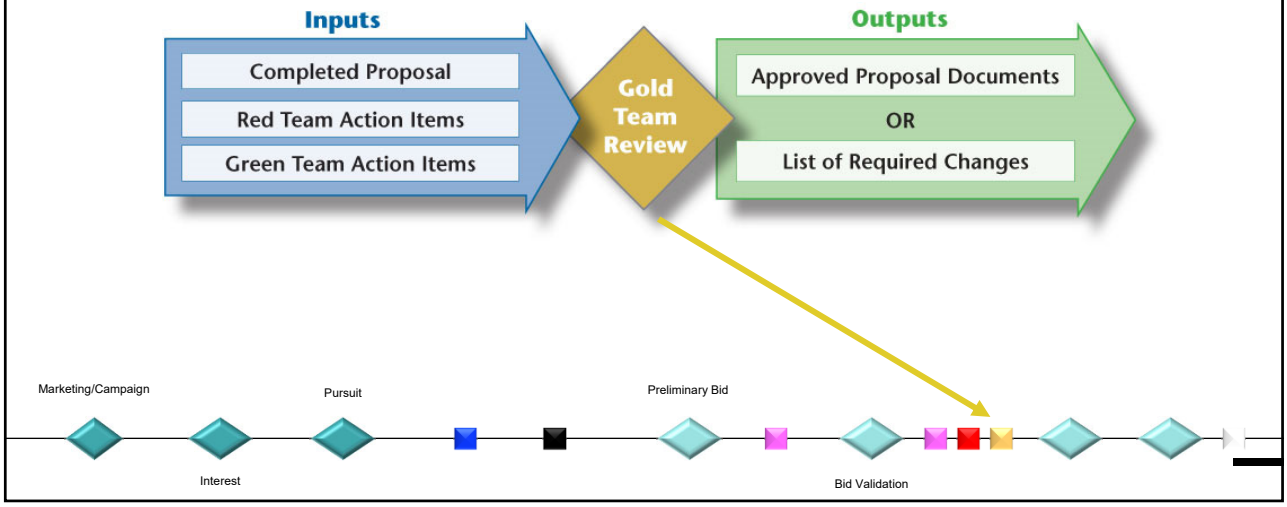
Pink Team Milestone Review



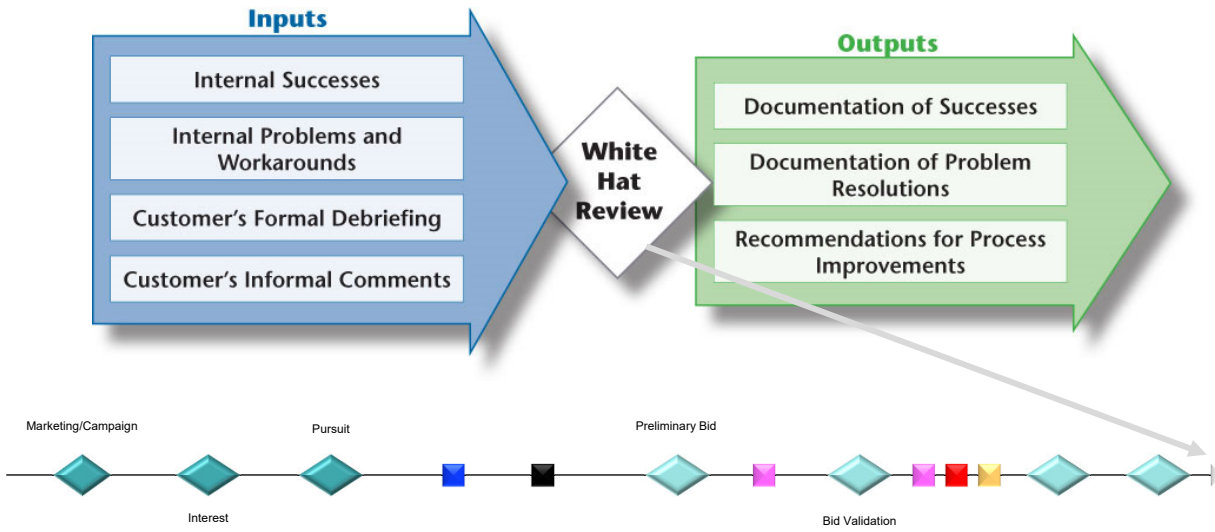
Red Team Milestone Review



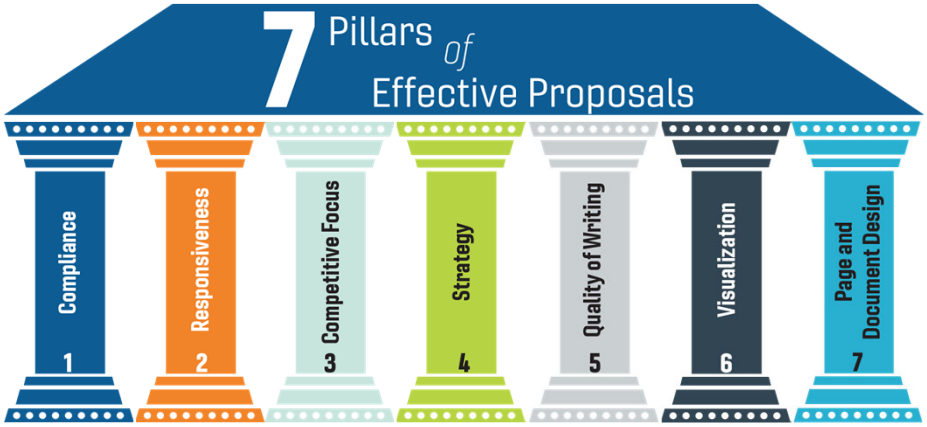
Gold Team Milestone Review



Lessons Learned / White Hat Review



All Reviews Focus on the 7 Pillars of a Quality Proposal



Applying an *Agile* Mindset to the Shipley Framework

Consistency

- Disciplined and scalable process
- Milestone decision gates
- Regular, consistent, and iterative reviews (individual and team)
- The right people

Scalability

- Number of activities and tasks
- Number, type, standards for reviews
- Number, type, size of documents reviewed
- Feedback at each step

Key Factors

- Time available
- Size, risk, value of opportunity
- Number of people involved
- Commitment from leadership
- Focus on win strategy

Making Team Reviews Work in an *Agile* Environment

Agile is a mindset:

- Agree on an approach
  - Daily, routine reviews
  - Key milestone reviews
  - Retrospective reviews
- Tailor and scale the approach based on the pursuit
  - Be flexible and nimble – manage parallel tasks
- Identify key personnel and outcomes from each review
- Leverage technology and collaboration tools
- Iterate and learn from each review

Session Take-Aways

- Establish a framework that works for you
- *Agile* methods and principles are being applied within the basic Shipley framework
- Milestone decision gates and regular reviews are essential to winning
- The purpose (outcome) of various reviews must be defined
- Be flexible in the approach and timing of reviews
- Be consistent – you can measure what you manage
- Win strategy and Pwin should drive activity

Applying Agile in a common framework increases efficiency and productivity.

Questions and Discussion

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