

# Use Case 1.0

## Proposal Manager and Relevant Match

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### Preface:

Proposals are industry responses to formal government solicitations. They commonly have a narrative part and a spreadsheet part. The Narrative describes capabilities or technical approach. Spreadsheet describes cost. The Narrative part contains various Sections, and always includes a Section referred to as the Statement of Work (SOW). RM addresses only the Statement of Work.

Both solicitations and proposals vary in content, structure and length. 20 pages for the Statement of Work is typical, and 50 pages for the Proposal is typical. Solicitations also very commonly allow only 30 days to respond, from the time the solicitation is released until a cut-off time when no further proposal submissions are allowed. This makes speed and accuracy a primary driver for the Proposal Manager.

Use Case from Proposal Managers Point of View.

	Days minus submission date "S"	Use Case Segments	Supplemental Comments
1.	S minus 45 days	<p>Jake is employed by a federal contractor as a Proposal Manager. He handles 3-4 major proposals each year, and 2-4 smaller proposals. He has a small technical team of subject matter experts, and a writing team of copywriters and editors. Sometimes Jake edits, but not usually.</p> <p>Today, Jake is notified of a pending solicitation from a Government agency, we will call "USG". Jake has not yet received the solicitation, he just knows it is imminent. Jake gets organized:</p> <ol style="list-style-type: none"> <li>1. Assemble the team</li> <li>2. Identify a restricted-access work area and computer</li> <li>3. Create a collaboration area or dropbox to hold documents</li> <li>4. Assemble documents from other proposals to reuse written sections and illustrations.</li> <li>5. Purchase Relevant Match license</li> </ol>	

2.		GET READY TO GET READY!	Jake knows about Relevant Match from advertisements. <ol style="list-style-type: none"> <li>1. He goes to the RM website.</li> <li>2. He selects "RM for Industry"</li> <li>3. He completes an on-line purchase order, prints it out, and submits it to his finance department.</li> </ol>	
3.				The finance department approves the purchase and a purchasing agent emails RSC with the purchase information RSC calls to the purchasing agent to confirm key information
4.		GET READY!	<ol style="list-style-type: none"> <li>1. The same or next day, Jake receives an email from RM confirming the order and directing him to the download site.</li> <li>2. Jake downloads RM, installs it, and copies the Machine ID</li> <li>3. Jake emails RSC Activation Center with the Machine ID and his order number.</li> <li>4. He gets a reply with the Activation Code</li> <li>5. Jack receives the Activation code via email</li> <li>6. Jake uses the code to activates the RM software</li> </ol>	See the Use Case 2 – RM Activation Center
5.	S minus 30 days	GET SET!	<ol style="list-style-type: none"> <li>1. Jake receives the Request for Proposal</li> <li>2. He separates the SOW from all other documents</li> <li>3. He enters the Company Information.</li> <li>4. He enters the Solicitation document information.</li> <li>5. He opens a new project in the Dashboard</li> <li>6. He uploads the SOW</li> <li>7. He receives an on-screen message that he is ready to match documents.</li> </ol>	He needs to enter maximum word count and page count.
6.	S minus 29 days	GO!	<ol style="list-style-type: none"> <li>1. Jake distributes the SOW to his writing team.</li> <li>2. He reads the SOW over and over.</li> <li>3. He develops a proposal "win" theme, timeline, and key messages</li> <li>4. He makes writing assignments and sets the first draft suspense date for his writers in 48 hours</li> </ol>	

7.	S minus 27 days	“FIRST CUT”	<ol style="list-style-type: none"> <li>1. Jake receives the draft sections from his writers</li> <li>2. He assembles them into a single document and makes some editorial changes.</li> <li>3. He opens RM to the Dashboard.</li> <li>4. He navigates to the Project</li> <li>5. He uploads the draft proposal #1 into RM</li> <li>6. He sees a cue that RM has analyzed the draft proposal.</li> <li>7. He views the word count and page count to ensure neither exceed the limit set by the proposal instructions</li> <li>8. He views the Correlation Score, showing .61, telling him the correlation is poor.</li> <li>9. He views the radar chart, and notes several spikes that tell him an overemphasis on “management” and “unique”, and underemphasis on “networks” and “standards”</li> <li>10. Jake directs his writing team to change emphasis in their writing</li> <li>11. He sets a new suspense for 0900 the day after next</li> </ol>	Functionality not yet implemented.
8.	S minus 25 days, 0900	“BUILDING THE STORY”	<ol style="list-style-type: none"> <li>1. Jake receives the draft sections from his writers</li> <li>2. He assembles them into a single document and makes some editorial changes.</li> <li>3. He uploads draft #2 into RM</li> <li>4. He checks the word count and page count</li> <li>5. He views the Correlation Score, and sees it has increased to .69, telling him that his writers are hitting key words.</li> <li>6. He reads the proposal to assess that it is understandable.</li> <li>7. He checks the Readability score in Word, and finds it’s too high</li> <li>8. He checks the radar chart and identifies 20 words that are not well correlated with the SOW.</li> <li>9. By 11am, he directs his writing team to change emphasis in their writing</li> <li>10. He sets a new suspense for 0900 the next day.</li> </ol>	Do we need a sidebar with a list of analysis done showing the proposal, the date, and the Correlation score, maybe page count.
9	This process continues daily for the next 10 days			
10	S minus 15 days	“CHANGE OF WRITERS”	A new writer joins the proposal team. Jake gives him writing instructions for a specific section and a suspense of the next day at 0900.	

11	S minus 14 days	"KEEP ON TRACK"	<p>The next day at 0900 Jake receives the draft sections from his writers, assembles them, and uploads draft #13.</p> <p>He checks the word count and page count, and finds there that page count is exceeded.</p> <p>He views the Correlation Score, and sees it has decreased to .64, telling him the new writer is not hitting the key themes and words.</p> <p>He checks the Readability score in Word, and finds it's too high</p> <p>He checks the radar chart and sees three words that spike, all related to the section written by the new writer.</p> <p>At 11am he meets with the new writer and instructs him.</p> <p>Jake sets a new suspense for 1500 for the new writer for a rewrite.</p> <p>At 1500 Jake receives the rewrite, combines it with the full document and uploads it to RM</p> <p>He sees the Correlation Score has gone back to .66, the Readability Score is lower, and the radar chart spikes have diminished. Jake is satisfied the new writer has made the adjustments.</p>	
12	S minus 25 days until S minus 5 days	"POLISHING THE STORY"	<p>Jake repeats this process daily of checking:</p> <ol style="list-style-type: none"> <li>1. Word count</li> <li>2. Page count</li> <li>3. Readability score</li> <li>4. Correlation score</li> <li>5. Radar chart</li> </ol> <p>He makes corrections until time expires and the proposal is locked for submission.</p>	
13		"CLEANING UP"	<p>Jake knows that the review and response to the proposal will take weeks to months. He will keep RM software and the documents on the machine until then.</p> <p>At a future time, Jake received notice that his proposal is accepted, and he begins to archive the proposal work.</p> <p>He turns the final proposal over to the project manager</p> <p>He moves all files into an archive area on his company server</p> <p>He allows the license to expire without further actions.</p>	

# Use Case 1.1

## Proposal Manager and Relevant Match- Solicitation is Amended

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### Preface:

It is common for one or more solicitation amendments to be issued by the Government, often after the initial release brings questions from the respondents. In this case, the Solicitation information remains the same, as does the company registration info. Since the SOW changes, a new project is needed to under the same license.

	Days minus submission date "S"		Use Case Segments	Supplemental Comments
0.	S minus 45 days through S minus 15 days		Jake talks Steps 1 – 9 of Use Case 1 in the same way.	

1.	S minus 14 days	"PROJECT PIVOT"	<p>Jake receives notification by email that an amendment to the Solicitation has been received. He meets with company management to review the new documents and to assess the changes. Jake determines by reading the SOW that one additional area of work has been added and two areas have been deleted.</p> <ol style="list-style-type: none"> <li>1. He calls together the proposal writers and SMEs and directs them to change their writing to reflect these changes. He sets the suspense for the rewrite for 0900 the following day.</li> <li>2. Jake opens RM and navigates to the dashboard.</li> <li>3. He opens a new project, naming it "Amendment 1"</li> <li>4. He compares the latest draft Proposal to the new SOW</li> <li>5. He sees a cue that RM has analyzed the draft proposal.</li> <li>6. He views the word count and page count to ensure neither exceed the limit set by the proposal instructions</li> <li>7. He views the Correlation Score, showing .50, telling him the correlation is worst against this new SOW.</li> <li>8. He views the radar chart, and notes several "In" spikes that that tell him he lacks words that address these two new areas in the SOW.</li> </ol>	With an amendment, the Submission Date is usually extended for another 2-4 weeks.
2.	S' minus 21 days	"KEEP ON TRACK"	<ol style="list-style-type: none"> <li>1. Jake receives the draft sections from his writers</li> <li>2. He assembles them into a single document and makes some editorial changes.</li> <li>3. He opens RM to the Dashboard.</li> <li>4. He navigates to the Project</li> <li>5. He uploads the draft proposal #1 into RM</li> <li>6. He sees a cue that RM has analyzed the draft proposal.</li> <li>7. He views the word count and page count to ensure neither exceed the limit set by the proposal instructions</li> <li>8. He views the Correlation Score, showing .65, telling him the correlation is improving.</li> <li>9. He views the radar chart, and notes in-spikes are smaller, telling him the writing is addressing the new SOW.</li> </ol>	S' is the amended Submission Date.

3.	S' minus 20 days until minus 5 days.	"POLISHING THE STORY"	Jake repeats this process daily of checking: 6. Word count 7. Page count 8. Readability score 9. Correlation score 10. Radar chart He makes corrections until time expires and the proposal is locked for submission.	
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# Use Case 1.3

## Proposal Manager and Relevant Match- Solicitation is Cancelled and Replaced with a new Solicitation – Kill Code

### Preface:

In this case, the current Solicitation

	Days minus submission date "S"		Use Case Segments	Supplemental Comments
0.	S minus 45 days through S minus 15 days		Jake talks Steps 1 – 9 of Use Case 1 in the same way.	
1.	S minus 14 days	"GET READY!"	Jake receives notification by email that the Solicitation he has been working on has been cancelled. He meets with company management and it is agreed that he should begin work an Alternative Solicitation. It is different from the first, so the Solicitation information is different. He emails RSC that he needs to change the license information. He does not want to pay for a new license.	Consistent with the idea that RM is "disposable software" Jake will need another license and installation for another Solicitation.
The price of a new license is a business decision that is set by sale policy. The issuance of a new license might be for a discounted cost, or at no additional cost. In any event, we can assume a new license will be issued along with a new order number.				
	S-Alt minus 30 days	"KILL CODE"	<ol style="list-style-type: none"> <li>1. Jake received instructions from RSC to generate a KILL code for the existing license.</li> <li>2. Jake runs the Kill code and sees a message that gives him a confirmation code.</li> <li>3. Jake contacts RSC with the confirmation code and receive a new Activation Code.</li> <li>4. Jake reinstalls the RM software with the new Activation Code.</li> </ol>	



	S-Alt minus 29 days	"GET SET!"	<ol style="list-style-type: none"> <li>1. Jake receives the Request for Proposal</li> <li>2. He separates the SOW from all other documents</li> <li>3. He enters the Company Information.</li> <li>4. He enters the Solicitation document information.</li> <li>5. He opens a new project in the Dashboard</li> <li>6. He uploads the SOW</li> <li>7. He receives an on-screen message that he is ready to match documents.</li> </ol>	
The rest of this Use Case continues the same as User Case #1, step 11 to end.				



