
“Death to Red Team!”

Our wine glasses clink. On what passes for a restaurant patio in Ottawa—a scattering of tables and white plastic lawn chairs on the fenced-in, wobble-inducing sidewalk of a major route in and out of the downtown—the Red Team survivors are sharing a toast.

This table for four is full. You’ve got your proposal manager. You’ve got your coster. You’ve got your editor. And you’ve got your palpable crankiness.

Along with a team of technical experts, the three of us have been hacking away on a proposal for almost five weeks. Two of us have been living away from home for that entire period: Our six-day work week doesn’t allow for flying across the better part of four provinces and through two time zones to touch the far end of the pool, do one of those fancy racing turns, and get back in time for Monday morning. Well, we could do it—just—but we’d be in the air longer than we’d be at home.

We’re just a little over a week away from the due date, and today was Red Team: the review of the written document. As always, the pricing review will come later, because numbers get stale faster than words, I guess.

Back in my early days in Proposal Land, my training consisted of being handed a printout of the slides from an American proposal course. That was my introduction to Red Team.

Red Team

verb:

- 1) the act of reviewing a proposal
Usage: When are you going to Red Team that document?

noun:

- 1) a milestone in the proposal schedule
Usage: When is Red Team?
- 2) a group of proposal reviewers
Usage: Who’s on Red Team?
- 3) a gauntlet to be run
Usage: How was Red Team?

Red Team seems to have originated in American defence contracting, where the stakes are high enough to warrant the investment of significant time and money in a professional review of the proposal. From the slides, Red Team seemed like a Big Deal. You had to get it all Just So:

- *The right participants:* Executives, technical gurus, marketing masters, client experts.
- *The right facilitator:* Someone external to the whole effort at least, and preferably an executive consultant type external to the company(ies) involved.
- *The right time:* Late enough in the proposal schedule to have a complete and polished document to look at, early enough to recover if it turns out not to be absolutely complete or perfectly polished.
- *The right preparation:* Everyone was to study the RFP ahead of time so they understood what goods and services were wanted, and knew what the proposal should look like.

Reviewing with the Executives

- *The right process:* Rigorous and yet feasible in the time allowed, detailed and yet holistic, building consensus and yet not losing any divergent opinions.
- *The right infrastructure:* A large meeting room with a whiteboard and flipchart paper for plenary sessions and quiet areas for individual work.
- *The right security:* Hard-copy proposals only that stayed in the room through the day and were locked-up at night.
- *The right output:* Clear, thorough, written direction to the proposal team on what to change, from typos to colours in graphics to proposal structure, from technical solutions to organization structure to marketing themes.

Proposal team members were excluded from Red Team so as not to taint its objectivity but were to hold themselves available to answer questions. It was pretty dagnabbed formal.

Ten years into my sojourn in Proposal Land, I still had not seen a Red Team run in exactly that way. Big projects got more attention than smaller ones, for sure, but we often had more executives and marketers in the room than seemed entirely reasonable, and fewer technical or operational types. We scheduled the review around executive availability, rather than at the optimal time for the proposal process. We wrote 5-page briefing notes and did verbal briefings so that no one needed to read the 300 pages in the RFP. We bowed to executive demands—I mean, we accommodated their preferences—to get the document in soft copy, ahead of time, so they could work on a plane or in their hotel room.

We broke the response into chunks and assigned each player a part of the whole, so that the whole activity wouldn't take any more than two days.

Given all these compromises to allow for changing work patterns, I snuck one more in whenever I could. So that the proposal team could get the output we needed in a format we could use, I worked with the proposal manager and the coster to lay out a workable review process that would put the two of them in the room.

The one thing I didn't get squishy about was having the right facilitator/recorder. I wasn't old school, insisting on an external, senior consultant type. I wanted someone else. *Someone who knew the response requirement in detail. Someone who knew the whole response, too, so they understood, in real time, the implications of any suggestions/directions. Someone who'd be helping writers implement the Red Team changes to their sections. Someone who'd be as skeptical about executive and marketing handwaving as the eventual evaluators would be.*

Yes, that's right, I wanted me.

So that's how I came to be in/on/at/sideswiped by this particular Red Team: As the smell of car exhaust mingles with the bouquet of my house red, I reflect first that it was my own fault for thinking I could do the job better than anyone else, and second, that I'd never seen anything quite so crazy.

Today's Red Team had been one of the less formal ones. Besides the three of us, our participants were the executive in charge, their direct reports, and one external reviewer from another project. An hour in, I knew we were in trouble.

Was the proposal perfect? Absolutely not. It wasn't even very good yet: It was just the best our thrown-together team could do in the time we had. Apart from the usual gaps and errors, there were sections whose tone was obnoxious: the best I could do in beating down a new-to-the-company senior technical expert whose first drafts were likely actionable from a legal perspective and certainly hideous from the marketing one.

But this was all par for the course, as, of course, everyone in the room knew. They knew that all I needed was the cover of their authority to change the offending sections myself if that's what it came down to. Instead, they pounced gleefully. And again. And again.

The first time I heard the same criticism, the same point, for the third time, I mentioned mildly that I had that point and suggested they move along. The fifteenth time (or was it the fiftieth?), I just turned without a word to the flipchart stand, recorded it, and turned around again to take the next hit for the team.

Everyone had to get on record. Was it some weird convergence of internal-division politics and preening for a superior, maybe with a liquid lunch thrown in? I didn't know.

But as the three of us slump into our dusty patio chairs and look at each other blankly, wondering what the hell we're going to tell our proposal colleagues the next morning—those poor devils hoping against hope for some kudos for their efforts, and fully expecting at least some constructive feedback—I at least know what the toast has to be.

"Death to Red Team."

That would be, let me see, Red Team as a noun, usage #2.