

Catalant Community Champions – Proposal Quarterback Overview (PQB)



Outline



Context behind the PQB role



Detailed description and how PQBs plug in to sales process



PQB deliverables



Expected time commitment



Support from Catalant



Compensation model

While our traditional approach has been successful, consulting toolkits that address client development is needed to win larger opportunities



Proposal QB (PQB) can bring everything together, highlight our advantages to clients, and create a win-win situation

Description of the PQB

Profile of PQB

- Former MBB Associate Partner or senior Engagement Manager
- Generalist skill set (SME preferred)
- Key skills in consulting toolkit, running large teams, Powerpoint

Role of PQB

- Single point of accountability to work with account executive and Principal SME to run proposal process
- Structure and synthesize scope
- Assemble proposal team
- Own framing message and proposal document (including fee structure)
- Ensure collaboration, accountability and progress

Why this is a win-win

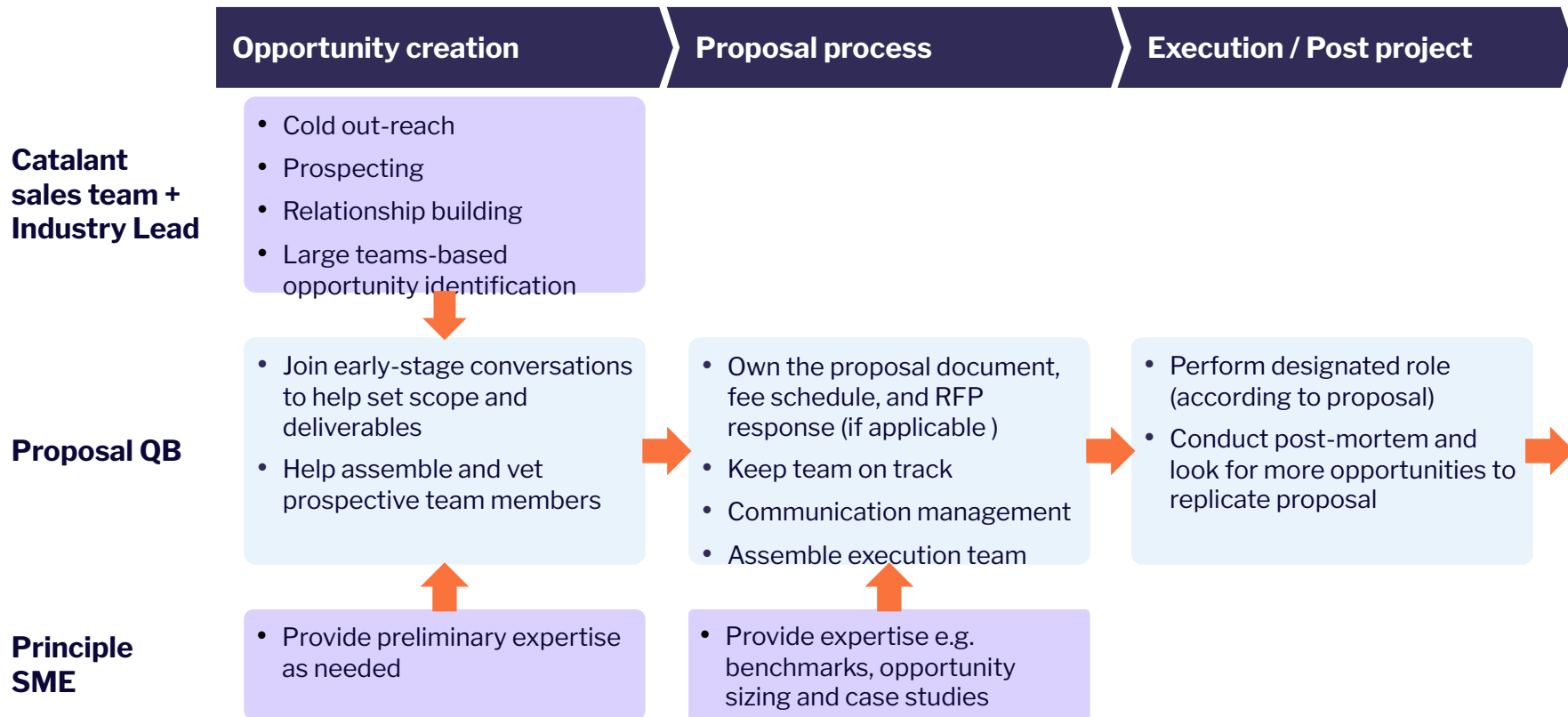
What Catalant gets

- Ability to attract and sustain bench of high-quality consultants/ subject matter experts
- Streamlined proposal team, improved division of labor that plays to everyone's strengths
- High quality proposal outputs that can directly compete with MBB & etc. offerings

What consultant gets

- Be behind the scenes for big \$\$ client dev opportunities
- Preferred status to higher value, longer utilization projects
- Ability to monetize core skill sets from MBB experience, and create additional income opportunities

A PQB's journey during a client development process



PQB deliverables – 6 items that form complete deliverable

Details to follow

Proposal QB package	Description
<input type="checkbox"/> RFP checklist (if applicable)	Synthesized list of specific requirements from RFP to make sure we hit them before submission
<input type="checkbox"/> Proposal document (Slides)	Presentation that gets the client excited about our understanding, expertise and approach
<input type="checkbox"/> SOW memo (Doc)	Statement of work outlining timeline, deliverables, team make up and pricing
<input type="checkbox"/> Fees model (xls)	A cash flow model that will project cash flow for large teams or complex arrangements and scenarios
<input type="checkbox"/> Proposal process meeting cadence (from scoping until delivery)	Schedule and facilitate check-ins, problem-solvings and alignment meetings
<input type="checkbox"/> Postmortem information	Factors of winnings, losing, document handover and ways to scale or expand

Skills we expect you to bring to the table:

- Experience creating compelling proposal documents with coherent narrative, key synthesis
- Skills in Powerpoint, simple analytics
- Experienced in consulting team assembly and fee structure

PQB deliverable – Key messages we need to drive home in the doc

Example layout of competitive proposal document, key elements and visualizations

Overview and our understanding of the problem statement

Executive summary

- A recent diagnosis found that BASF-ECMS has €30M* (10%) cost reduction opportunity in indirect procurement
- 5-6 primary categories, across North America, Europe and Asia
- Significant challenges exist in data quality, processes and capability to execute
- Selecting the right value capture partner is critical, and can often lead to delivering our targets, saving operational capability and having better automatic processes and tools

Catalant is uniquely positioned to support you along this journey

- Full value of high experienced experts, but will collaborate hand-in-hand with you
- Significant competitive advantages (e.g., lower cost, ability to support regulations)
- Robust transformation approach that delivers impact quickly while also focuses on coaching, collaboration, and capability building for long-term sustainability

We are proposing a structure that facilitates performance and collaboration

- If there is mutual enthusiasm, we can start working quickly to create value
- Create framework of partnership and offer initial in opportunity
- Structure available data and build data-driven decisions
- Launch Catalant teams on the ground to begin gauging current state processes and practices

Executive summary

ECMS' challenge – Deliver 10% indirect procurement savings globally, while improve processes and enhancing data along the way

Objectives

- Highly experienced target on ECMS
- Reduce indirect spend
- Improve data quality
- Improve process efficiency
- Improve data quality
- Improve process efficiency

Challenges

- Complexity
- Global
- Multiple
- Multiple
- Multiple
- Multiple

Key messages

- ECMS' challenge
- Objectives
- Challenges
- Key messages

Summary of context

Catalant's approach to capture value: Combining experienced procurement experts, transformation process and competitive edge

Why bring complementary people, processes and tools to help you achieve your goals?

- Experienced procurement experts
- Transformation process
- Competitive edge

Value prop of our team

- Experienced procurement experts
- Transformation process
- Competitive edge

Value prop of our team

We have a great approach

Initial analysis indicates that ~60% of the spend has high potential that...

we are confident can achieve \$26-65M in savings with basic actions

Building capabilities

- Initial analysis
- Building capabilities
- Initial analysis
- Building capabilities

Outcomes

- Initial analysis
- Building capabilities
- Initial analysis
- Building capabilities

Incoming hypothesis

Our approach to capture impact: 6-8 months, hands-on support upfront, pivot to capability building and sustainment on backend

What to expect

- Initial analysis
- Building capabilities
- Initial analysis
- Building capabilities

What to expect

- Initial analysis
- Building capabilities
- Initial analysis
- Building capabilities

Approach and timeline

Our highly experienced team: 10+ years of experience on average in transformation and procurement, at all levels of the team

Senior leadership

- Senior leadership
- Senior leadership
- Senior leadership
- Senior leadership

Execution team (Not exhaustive!)

- Execution team
- Execution team
- Execution team
- Execution team

Our team / our advantage

How we will work together: Our team will collaborate and listen to you, and keep our eyes on the prize together

Senior leadership

- Senior leadership
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- Senior leadership

Execution team

- Execution team
- Execution team
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- Execution team

How we will work together

We are imminently qualified and have crushed this work before

Team profiles: Senior leadership

- Senior leadership
- Senior leadership
- Senior leadership
- Senior leadership

Team profiles

- Team profiles
- Team profiles
- Team profiles
- Team profiles

Our amazing expertise

Case study 4: Operating model and system architecture design in disaggregated environment

Operating model

- Operating model
- Operating model
- Operating model
- Operating model

System architecture

- System architecture
- System architecture
- System architecture
- System architecture

Case study 1

Case study 3: Fast, data driven procurement value creation at Global CPG client

Operating model

- Operating model
- Operating model
- Operating model
- Operating model

System architecture

- System architecture
- System architecture
- System architecture
- System architecture

Case study 2

Call to action

Next steps: If a partnership with Catalant is exciting and worth pursuing, we can hit the ground quickly to set up a successful program

- Collaborate with us on forming details of the partnership – Achieve alignment on timelines, accessibility, initial alignment, etc.
- Deploy our experts for quick walkthrough of sites – Observe operations and practices, listen to perspectives the team on current state and challenges
- Best effort to gather and structure available data – understand data and systems landscapes, understand what is possible

Immediate next steps

What to expect on a typical 2-week deployment as a Proposal QB

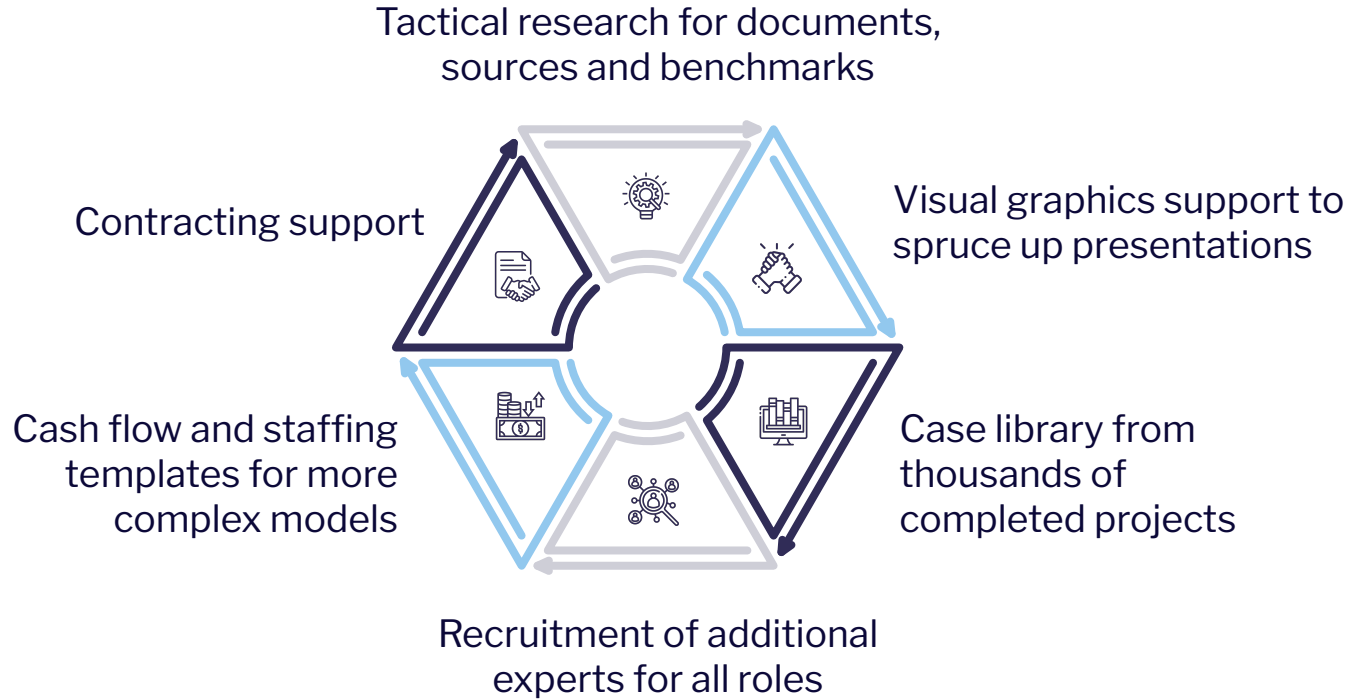
What to expect	Detailed tasks	Est. time commitment , hours
Gathering context	<ul style="list-style-type: none"> Looking through client notes Attend scoping meeting (if applicable) Read through RFP and gather requirements checklist (if applicable) 	4
Creating document	<ul style="list-style-type: none"> Creating client document Creating fees models and scenarios Drafting SOW memo 	16
Facilitate collaboration meetings	<ul style="list-style-type: none"> Supporting expert meetings Collaboration meetings with working team Status update with Catalant leadership (if applicable) 	5
Postmortem	<ul style="list-style-type: none"> Jot down unfiltered notes on what went well, and what didn't go well and what opportunities there are to develop additional opportunities Postmortem meeting with Admin team 	1
Total estimated time commitment over 2 weeks		26

While we are counting on the expertise and content creation skillsets of the PQB, we are also encouraging delegation and coordinating Catalant resources where helpful




Example of successful collaboration points include:

- Sourcing additional expertise and team members
- Consolidating bio pages
- Final QC
- Visuals design
- Scheduling

Catalant can provide a full range of resources to help make the proposal process a success for the QB and client



PQB compensation – Targeted around addressing the biggest concerns for consultants – qualified opportunities, utilization and flexibility

Key concern	Program design that addresses this
 Over committing to opportunities	\$2,000 per proposal, with a bonus for winning
 Assure utilization	First right of refusal to execute project
 Create flexible engagement model that works for you	Flexibility to structure role and financial incentive