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CEO/COO Forum

by Tony Birch and Paul Taylor

In the last two years the Board has used a balanced scorecard approach to establish goals for the Association. The intention is to continue using this approach to establish a consistent strategy for the future. It will also facilitate measurement of achieving those objectives.

The goals may change to respond to external factors; however, those contained within the current scorecard are:

- Increase of 10 percent in new memberships per year
- Retention of 70 percent of existing members per year
- Increase in Conference attendance by 15 percent per year
- Reinvest 20 percent of revenues into existing and new programs
- Achieve 50 percent accredited membership by 2010.

We recognize that we will achieve these goals only by increasing the benefits the APMP offers to its membership—investing both effort and funding in the future of the Association.

Some of the activities associated with achieving these goals have already been shared with members, both in articles and at conferences. The APMP has:

- Launched its professional accreditation program
- Commenced investment in the Proposal Body of Knowledge in collaboration with the BD-Institute
- Supported, and continues to promote, the foundation of new chapters in Europe, South Africa, and Australia
- Funded the development and implementation of a new, easy-to-use Website
- Been involved in, and continues to develop, the Proposal-XML (P-XML) schema—a shared vocabulary that allows software, such as Word, to interpret information supplied in proposals, by people.

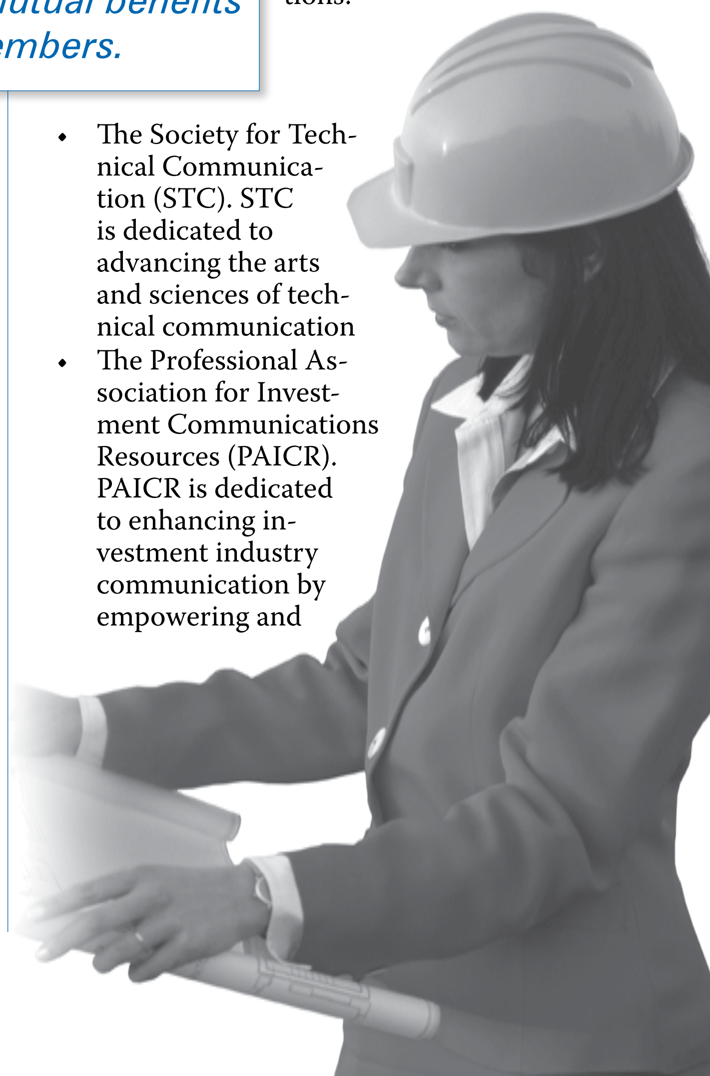
There a three other key activities that have been identified as critical to achieving these goals. They are to:

- Work with other professional associations to promote the APMP itself and secure mutual benefits for members
- Increase the involvement of Chapters in the running of the Association and the setting of future strategy
- Provide and promote a Corporate Membership Scheme to encourage organizations to support members in both attending conferences and achieving professional accreditation.

Work with other professional associations to promote the APMP itself and secure mutual benefits for members

Work with other professional associations to promote the APMP itself and secure mutual benefits for members.

At present, we are in early discussions with the following organizations:



- The Society for Technical Communication (STC). STC is dedicated to advancing the arts and sciences of technical communication
- The Professional Association for Investment Communications Resources (PAICR). PAICR is dedicated to enhancing investment industry communication by empowering and

educating men and women worldwide who are involved in marketing-related roles
- The Association for Project Management (APM). APM is dedicated to developing and promoting the professional disciplines of project and program management for the public benefit
- The Project Management Institute (PMI). PMI is the world's leading not-for-profit professional association dedicated to advancing state-of-the-art programs in project management.

With each of these organizations we are considering providing additional benefits to our own, and their, members through:

- Free exchange of magazines and publications via Web access
- Cross-referencing and promotion of events (with logos, Web links, etc.)
- Event pricing for each organization's members to encourage participation
- Co-developed and/or hosted educational events and Webinars
- Co-sponsoring conferences and chapter events.

Increase the involvement of Chapters in the running of the Association and the setting of future strategy

At the end of this year we intend to begin holding a regular (each quarter or two months, as required) conference call with all Chapter Chairs. The call is designed to be a forum for exchanging ideas with the Chapters. This will be a two-way activity.

Currently, minutes of Board meetings are circulated to the Chapter Chairs, but this is a passive, one-way, communication tool. It does not encourage an exchange of ideas. The conference call should change that.

Increase the involvement of Chapters in the running of the Association and the setting of future strategy.

All Chapter Chairs, national and international, will be invited to take part. All will be asked to represent their Chapters by:

- Putting forward ideas for improving communication within the Association
- Acting as the channel for information needing to be communicated to Chapter members from the Board
- Participating in developing future strategies to help the Association achieve its goals.

Provide and promote a Corporate Membership Scheme to encourage organizations to support members in both attending conferences and achieving professional accreditation

Corporate Members will be able to claim memberships of the Association and attendance at conferences for their staff. APMP Corporate Membership will allow organizations to:

- Develop their proposal management capability
- Align management development programs with best practice in the profession
- Keep proposal managers up-to-date with latest thinking
- Access the APMP Body of Knowledge, providing knowledge that underpins the profession
- Obtain discounts of between 10 percent and 30 percent on the fees for the elements of the Corporate Membership package.

All of these activities have been started to help us achieve the APMP's mission of advancing the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits. We are sure there are more things we can do, and, with your support, we will.

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Membership

APMP's mission is to advance the art, science, and technology of business development acquisition and to promote the professionalism of those engaged in those pursuits through the sharing of non-proprietary proposal methods, approaches, and processes. APMP conducts meetings and events both on a national/international scale and at the local level through individual chapters.

Our annual membership fee is $95. APMP's Federal Tax I.D. Number is 87-0469987. You may obtain a membership form in Adobe Acrobat/PDF format from the APMP Website, www.apmp.org. Send your completed membership form to: APMP, Attn: Membership Applications, 300 Smelter Ave. NE #1, PMB 383;, Great Falls, MT, 59404. (406) 788-9840, (406) 454-0090 fax.

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Concept Approval	Late October	Late April
Summary & Outline Due	Mid-November	Mid-May
Article First Draft Due	Late December	Late June
Article Final Draft Due	Late January	Late July
Peer Review & Updates	Late March	Late September
Print & Distribute	June	December

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If you would like to submit an article, begin by reading the Editorial Statement and Guidelines for Authors on the following pages. There you will find our general guidance on manuscript preparation, scope of content, style, and methodology for submission and review.

Guidelines for Authors

Proposal Management, the Professional Journal of the Association of Proposal Management Professionals (APMP), publishes articles, research, and case studies about business development and proposal management.

Editorial Statement

Proposal Management invites authors to submit their best research for peer review. Manuscripts may be of practical or scholarly importance to APMP's audience of proposal development, acquisition, procurement, business development, sales, and program management professionals.

Content

Proposal Management publishes the following types of peer-reviewed articles:

- Results of original research on proposal-related topics.
- Original contributions to proposal-related theory.
- Case studies of solutions to proposal-related problems.
- Tutorials on proposal-related processes or procedures that respond to new laws, standards, requirements, techniques, or technologies.
- Reviews of proposal-related research, products, books, bibliographies, and bibliographic essays.
- Views and commentary.

The journal promotes APMP and its goals through the timely publication of articles, reviews, and references. The journal is a medium for promoting constructive, intelligent discussion and debate about business development acquisition and proposal management. Because the primary audience of the APMP professional journal is informed practitioners in the private, government, and nonprofit sectors, manuscripts reporting the results of research or proposing theories about topics should include descriptions of or suggestions for practical applications.

Submissions

The following are requirements for articles/manuscripts submitted:

- Not more than 30 pages, including exhibits, printed on 8 1/2" by 11" paper.
- 12-point font and at least one-inch margins on all four sides.
- Double-spaced throughout, including references.
- Submit an electronic file of your article via e-mail or on a CD-ROM. Microsoft Word is the preferred electronic format; Corel WordPerfect, Rich Text Format (RTF), or ASCII file format are also acceptable. Alternatively, you may submit four hard copies of your article via regular mail.
- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format. Screenshots are preferred to be captured and output should be 6" (width) by 4.5" (height) for full screens.
- Submit your article to *Proposal Management*'s Managing Editor or the Chair of the Editorial Advisory Board. (General inquiries can be made to the APMP Executive Director at (949) 493-9398.)

Note: We also solicit guest commentators for contributions to Trends and Views.

Manuscript Preparation

The following guidelines should be followed in preparing manuscripts for submission:

- Provide the manuscript's title and name(s) of author(s) at the beginning of the paper.
- Provide an informative abstract labeled *Summary* of approximately 150 words.
- Use up to fourth levels headings.
- Place all exhibits in the text with a descriptive caption.
- Bibliographic references should be indicated in the text by the last name and year of publication in parenthesis [i.e., (Jones, 1978)]. At the end of the text, provide a complete list of works cited (labeled "References") using full names of the authors and their book.
- All citations in References should conform to standard academic practices.
- Conformance with *The Chicago Manual of Style*, 14th Edition, pp. 640-699, is preferred.
- At the end of the text file, include a biographical sketch labeled "Author(s)" of no more than 100 words for each author. Describe author's professional experience, education, institutional affiliation, professional organizations, and other relevant information. Include e-mail address and a telephone number where you can be reached during business hours.

Style

Proposal Management articles must be well-organized and readable. Write clearly and avoid jargon and acronyms. Use the active voice. Avoid language that might be construed as sexist, and write with the journal's international audience in mind.

Spelling and usage should conform to *The American Heritage Dictionary*, 4th edition and *The Associated Press* stylebook. Punctuation, format, and citation style should conform to *The Chicago Manual of Style*, 14th edition.

Review

Submissions, if they conform to the above specifications, will be reviewed by the Journal's Editorial Advisory Board in accordance with the Board's internal procedures for review. In general, an article will be evaluated in terms of the relevance of the topic, its potential contribution to our understanding of business development or proposal management, and its readability. When appropriate, the Board may provide the author with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

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The information and viewpoints expressed by authors or staff members in the journal should be based on objective, balanced research and analysis to the extent afforded by available resources. The views expressed by contributors and staff do not necessarily represent the views of APMP.

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Welcome

by John Elder

This issue of the *Journal* contains a lot of varied information—information related to the proposal process and to APMP as an organization. In the CEO/COO Forum, Tony Birch and Paul Taylor discuss several goals the Board of Directors established for the future of APMP. To provide relevant information about the Accreditation Program, starting with this issue, at least one book will be reviewed that ties back to the syllabi and can be used as a resource for members pursuing this professional achievement. Also, a list of APMP Approved Training Organizations is provided to help future accredited proposal professionals prepare for the test.

In addition to these regular features, articles covering a wide range of topics are included, such as:

- Highlighting the surprising similarities between a political campaign and the proposal process
- Demonstrating the advantages of augmenting a proposal team with interns
- Helping new proposal managers handle the inherent stress we experience in our profession
- Implementing strategies for creating new graphics
- Remembering the legacy of writer, management consultant, and university professor, Peter F. Drucker.

Finally, as you may know, APMP has embarked on several initiatives, such as the Body of Knowledge, to provide proposal professionals with a repository of best practices and other information. The restructuring of the Website is now complete! Please log on at www.apmp.org to see the wealth of information that is available, including new "Members Only" areas, updated Association and Chapter news pages, and a call for papers and other information regarding the 18th Annual APMP International Conference and Exhibits to be held in Savannah, GA.

Stay tuned for more information in future issues of the *Journal,* and the *Perspective* online, about the initiatives being put in place by APMP to advance the arts, sciences, and technology of our profession.

APMP Code of Ethics

Members of the APMP are expected to:

1. Comply with rules, government regulations, and laws in their respective countries, as well as other appropriate private and public regulatory agencies.
2. Ensure compliance with all rules concerning interaction with clients and Government liaisons.
3. Protect sensitive information and comply with all legal requirements for the disclosure of information.
4. Avoid conflicts of interest, or the appearance of same, and disclose to their employer or client any circumstances that may influence their judgment and objectivity.
5. Ensure that a mutual understanding of the objectives, scope, work plan, and fee arrangements has been established before accepting any assignment.
6. Represent the proposal profession with integrity in their relationships with employers, clients, colleagues, and the general public.
7. When in doubt about how to resolve an ethical dilemma, confer with a person you trust—one who is not directly involved in the outcome.


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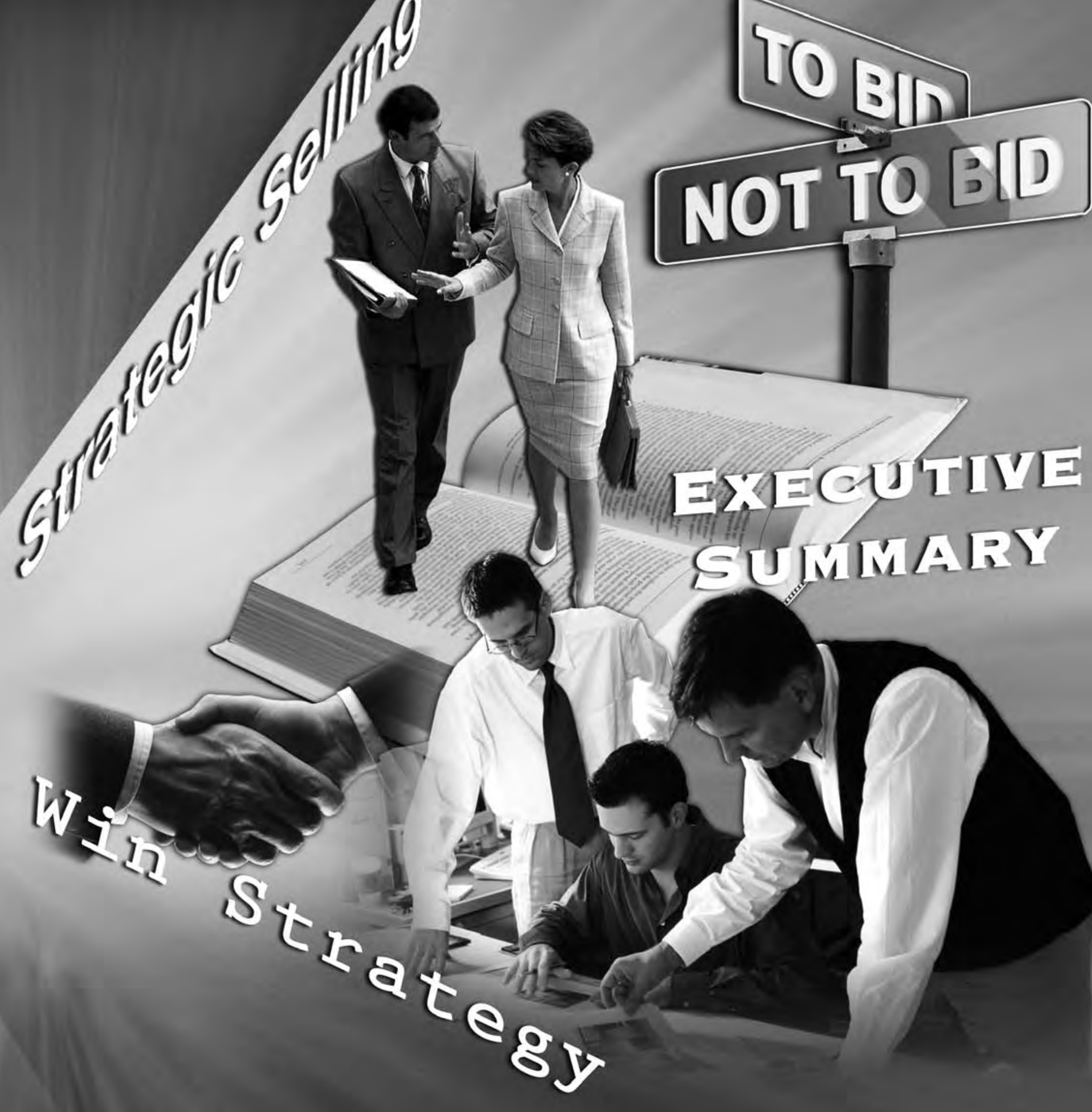


Campaign to Win!

by Jay Herther

By definition, most political candidates who campaign lose. The same can be said for proposal efforts. So, what are the differences between winning and losing? A full-fledged political campaign is a good model for running a winning capture process from concept to contract. A political campaign is a good fit since it is by design an organized effort to influence decisions. A campaign model is particularly applicable to significant procurements that typically have complex buying influences, lengthy procurement cycles, and an evaluation committee. On Election Day the goal is to get the most votes, like the final evaluation of the proposal. The difference between winning and losing can be a paper-thin margin.

Many of the techniques for winning in the political arena are very similar to those in competitive procurement. For example, starting early, developing a sound campaign strategy, and delivering the right (i.e., customer-focused) targeted campaign messages (read: unique win themes or discriminators) are critical success factors.

In this article, campaign and capture techniques are compared to expose key elements that can be applied to the proposal process. Writing a great proposal is a necessary but not sufficient step to winning. Incorporating the described campaign concepts before the RFP is the other critical element.

With the exception of alleged voting irregularities in Florida during the Presidential election of 2000, it's clear that the parallel between a political campaign and the capture/proposal process is startling, as shown in *Figure 1*.

	Campaign	Capture/Proposal Process
When to Start	Presidential candidates start 2-3 years before election	Large opportunities—"Positioning to win" starts 2-3 years before the release of the final RFP or RFS
Strategy	Campaign strategy to beat the competition (often an incumbent and to delight the stakeholders/voters	Same
Messaging	Campaign media, press conferences, win themes, white papers/position papers, addressing of red flags/issues, slogans, soundbites, ads, press releases, benefits . . .	Same
Comparisons	Spin doctors and negative campaigning (mud slinging)	Some competitors use these tactics and generate FUD (fear, uncertainty, and doubt); others address customer's "hopes, fears, and biases" (Beveridge, 1978)
Influencers	Lobbyists, opinion leaders, pundits, consultants, interest groups that have clout (e.g., labor, civil rights . . .), third-party references and testimonials (proof sources)	Same "As"
Face-to-Face Meetings	Whistle-stop tours, town hall meetings, "meet-the-candidate" events and debates	Trade-shows, sales calls, customer briefings and orals, questions and answers.
Well Communicated	Simple messages ghosting your competitors and rallying your voters! Messages must be simple, consistent, and repeated often	The 5 Cs are important in proposal messaging: Compliant, Compelling, Concise, Competitive, and Customer-Focused
Voting Process	• Get out the votes (GOTV) • Private ballot booth • Electoral delegates represent their constituents	• Get your supporters in a position to vote or assign delegate voters • Private scoring by evaluators • An evaluation and source selection committee represents the stakeholders and users
Aftermath	Re-counts, recall election, hanging chads . . .	Protests, re-bids

Figure 1. The Capture process is directly analogous to executing a major political campaign.

Just like Chuck Keller's award-winning APMP article comparing proposal writing with writing newspaper copy, our political campaign analogy defines the business development and capture process. *Figure 2* illustrates six stages of a political campaign and their analogous, actionable tasks in the capture lifecycle process. This is a similar framework to the Capture Management Life-Cycle [Garnett, 2003]. The Garnett Life-Cycle model has three phases and 10 stages. The *Herther Campaign framework* is broken into six stages, each containing four actionable tasks.

We will describe each of the six stages, starting first with the Campaign process followed by the corresponding steps in a Capture process. The bracketed comments serve to transcend the analogies from the Campaign to a Capture.

"Go where the ducks are"

Stage 1 – Deciding Whether to Run (Bid)

Campaign

Deciding whether to run for an elected political position is critical since it requires a significant commitment of time, human resources, and money. A candidate must determine, through polls and by meeting with voters, if he or she has a reasonable chance of winning. Typically, the incumbent in an election or the existing vendor has an advantage—*if* that incumbent has performed well and met their campaign promises with contract deliverables, Service Level Agreements (SLAs), performance metrics, and acceptable schedules. Often, candidates confer with family and decide if they want to go through this arduous process. The candidate also decides which states to Bid or No Bid or ways to prioritize the precious resources that are devoted to attempting to win each state. For example, some states wherein the party in office generally wins are similar to "sole-source" procurements. In effect, there is a high probability of win and minimal resources are required. Conversely, some states may be highly unlikely to win and are essentially "No Bids," thus only worthy of applying limited or no resources.

"Go where the ducks are"—this means focusing on the states with a large number of electoral votes and uncommitted voters, and go lightest in the states where the candidate is either very popular or unpopular (Choosing the President, 1972). Winning requires a focused, concerted effort. Richard Nixon's pledge in 1960 to visit all 50 states was widely regarded as unwise since it forced him to fly to Alaska very late in the campaign rather than devoting his waning energy to the more important urban states. (Choosing the President, 1972).

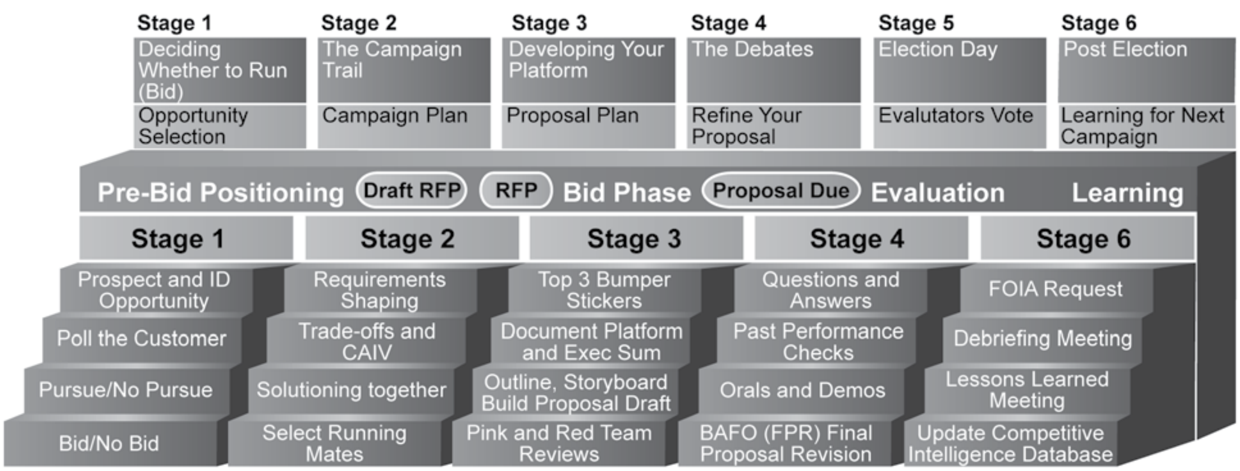


Figure 2. The Capture process should mirror the stages of a political campaign. The actionable tasks are shown as gray stair steps under each stage.

** CAIV = Cost As an Independent Variable (this term is described later)*

Capture

Similarly, focusing on the right jobs to bid by making smart bid/no bid decisions is perhaps the most important element in the Capture process (Herther, 2006). Three simple questions should be asked and answered:

1) Will anyone win? (Is there a budget, champion, and operational need?)
2) Can we win? (Does your company have a unique competitive discriminator?)
3) Do we want to win? (Is the opportunity profitable and/or strategic?)

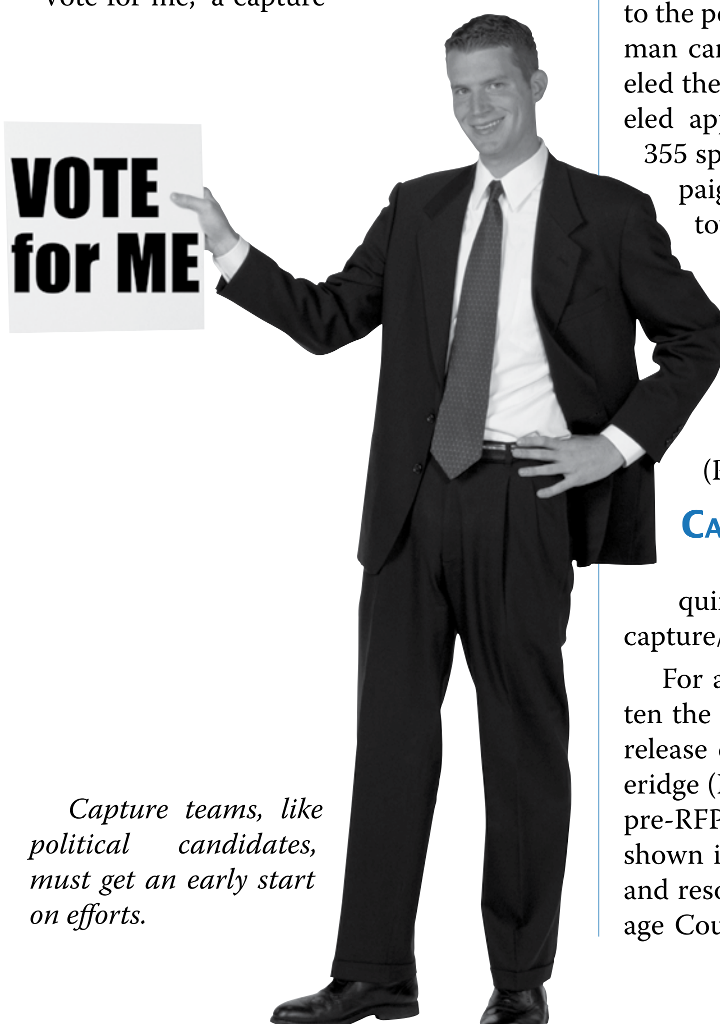
Stage 2 – The Campaign Trail (Pre–RFP Positioning)

Campaign

Just as a politician would not start a campaign by showing up Election Day morning with a sign outside the voting booth saying, "Vote for me," a capture team must get an early start. The higher the elected position, the sooner you must start. Hubert Humphrey learned this lesson when he held the 1968 Convention in late August in Chicago. "The next Monday was Labor Day. That gave Humphrey only 48 hours instead of seven weeks. Quite a difference" (Napolitan, 1972). Starting early is particularly true since "the majority of voters will have already made up their minds by the end of the National Conventions" (Choosing the President, 1972). Farley's Law supports this claim, stating that "nothing happens between nominating conventions and election day to change the minds of voters." The best way to start is to meet many voters, ask many questions, and shake many hands. For example,

A capture team must get an early start. The higher the elected position, the sooner you must start.

"Truman's campaign was based on getting out to the people. While Dewey was aloof and stuffy, Truman was open, friendly, and seemed one with the people. In order to talk to the people, Truman got in his special Pullman car, the Ferdinand Magellan, and traveled the country. In six weeks, Truman traveled approximately 32,000 miles and gave 355 speeches. On this "Whistle-Stop Campaign," Truman would stop at town after town and give the same speech, have people ask questions, introduce his family, and shake hands. From his dedication and strong will to fight as an underdog against the Republicans, Harry Truman acquired the slogan, "Give 'em hell, Harry!" (Rosenberg).



Capture teams, like political candidates, must get an early start on efforts.

Capture

Similarly, this same head start is required for competing successfully on a capture/proposal effort.

For a proposal to be successful, most often the campaign must start well before the release of the final RFP or RFS. James Beveridge (Beveridge & Velton, 1982) called this pre-RFP time frame "Leverage Country." As shown in *Figure 3*, 60 percent of the energy and resources should be expended in Leverage Country to shape the RFP and solution together with the customer to maximize the probability of a win.

This pioneering Beveridge data was substantiated by the Defense Contracting Auditing Agency (DCAA) when that Agency reviewed 367 DoD awards and determined that the Best-in-Class winning companies invested 57 percent before the final RFP, 30 percent during the RFP response, and 13 percent after the proposal was submitted (APMP Conference, 2006).

Like political campaigns, it's easier to win support when the people don't think you are campaigning. When you are actually campaigning, everyone is a little more suspicious of your message. So, early campaigning has a force-multiplier effect. Bobby Kennedy was JFK's Campaign manager and he understood this—"Jack, what has been done about the campaign, what planning has been done? A day lost now can't be picked up at the other end. It's ridiculous that more work hasn't already been done" (Dallek, 2003).

Winning companies invested 57 percent before the final RFP, 30 percent during the RFP response, and 13 percent after the proposal was submitted.

Six simple methods to use in Leverage Country are:

1. ***Access*** – One of the first campaign issues is gaining access to communicate the messages that matter most. How do you gain access to the "thought leaders," the opinion shapers, and the groups that act as endorsers? Utilize events such as conferences and trade shows and perform a Blitzkrieg of visits to customers. As Bobby Kennedy said during the 1960 JFK campaign—"what are we doing?! Let's get on the road! I want us all on the road tomorrow!" (Dallek, 2003).
2. ***Requirements Shaping*** – This requires understanding the implicit, often unwritten customer/user requirements. Intimate knowledge of the customer's needs, wants, and delights is sometimes referred to as the "true RFP" (or Real Felt Pain). The goal is to collaborate with the RFP developers to shape the procurement and steer the requirements in the direction that you want them to go. You can over-amplify discriminating features

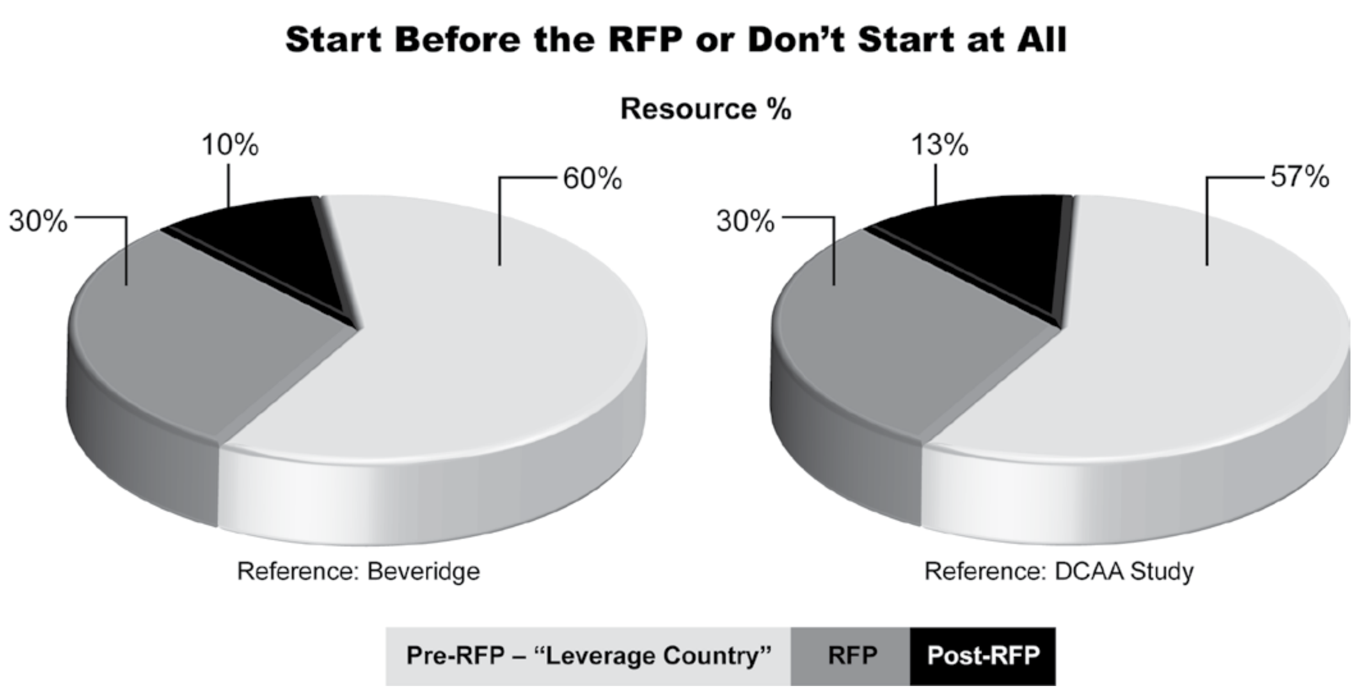


Figure 3. Sixty percent of the effort and resources should occur before the final RFP is released.

or specifications that if incorporated in the RFP specification would later serve to put your competitors on the defensive or disadvantaged. Often you can help the customer start by supplying a guideform specification as a template. ***The message: if you have not helped write the RFP, you are probably dead in the water.*** On a similar note, part of the secret to Napoleon's success was that he always arrived 15 minutes early to a battle. It is good to be early, and tough slogging if you are late.

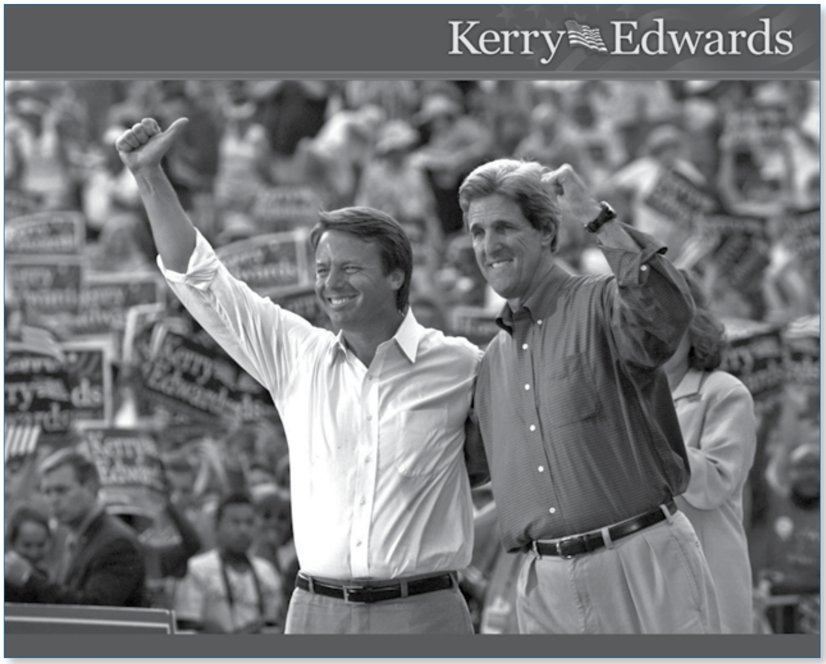
3. ***Explore the Tradespace*** – Life is full of trade-offs. Work with the customer to understand different ways to solve the problem. When a customer has a fixed budget – CAIV (Cost As an Independent Variable) is an important systems engineering technique. In CAIV, the customer selects some cardinal requirements (sometimes called KPPs—Key Performance Parameters) that are the "must haves" and are non-negotiable. The other requirements can be traded off to meet a cost target or budget.
4. ***Solutioning Together*** – This is when you develop and execute a contact plan to "***Play Chess***" (King on King, Bishop on Bishop, and Pawn on Pawn), meaning that you link up counterparts. For example, the solution architect meets with the corresponding customer engineer. Subject Matter Experts (SMEs) align to jointly develop the solution. The customer should feel that it is their design/product or service that you are proposing. The goal is for the customer to state in the post award debriefing, "When I read your proposal, it was as though I was reading my own thoughts" (Pugh, 2005, p. 9).
5. ***Targeted Messaging*** – It is critical to target the right messages to the right people at the right time. Three steps to winning any election are: 1) Define the message, 2) Select the vehicles of communication, and 3) Implement the communication process (Napolitan, 1972). There is a whole strategy to planning out this process in a contact plan specifying who to meet with, what's the message, when is the most effective time and always ask—who should I speak to next? The messages can be conveyed in a "10-second sound bite," the "30-second elevator speech," the "photo opportunity" (or a video submitted with the proposal), the "take-away" box on a viewgraph, and the action caption on a graphic in your proposal.

The messages can be conveyed in a "10 second sound bite," the "30 second elevator speech", the "photo opportunity," the "take-away" box on a viewgraph, and the action caption on a graphic in your proposal.

Back as far as the 1934 California Governor Campaign, a "spot announcement" of only 35 words long started appearing on the radio (Mitchell, 1992). "Michael Dukakis commented that his biggest mistake in 1988 was not realizing that the campaign centered on 10 second sound bites. Indeed, one study showed that the candidates' average speaking appearance on network news programs was 9.8 seconds, down from 42 seconds in the Nixon-Humphrey race in 1968 (Mitchell, 1992). The message must be simple, consistent, and repeated ad naseum. My experience after a win is that the customer can parrot back the three reasons that you won concisely in about 30 seconds. The goals of your targeted contact plan are to:

- Win over those "on the fence" (undecided/uncommitted voters)
- Neutralize the "unconvertible"
- Keep the support you have and build a strong champion that is your advocate when you are not there.

A political equivalent is that "a campaign has to do more than (perhaps) convert the opposition, activate the apathetic, and convince the doubtful; it also serves to reinforce



Picking a running mate that can augment your strengths and your coffers is essential to winning a successful race.

the faithful" (Choosing the President, 1972).

6. ***Select Your Running Mates*** – It is critical to round out your ticket early. Presidential candidates select Vice Presidential running mates who augment their strengths and addresses their weaknesses and gains votes in different regions or demographics (this is known as "balancing the ticket"). "Politically, Johnson seemed the most likely of all to win crucial states" in the JFK election in 1960 (Dallek, 2003). Similarly, selecting the right teammates/partners is critical to your capture strategy.

Every successful campaign has a political campaign manager that works with the candidate to develop a win strategy and platform.

This is also the stage to raise funds. Comparable to campaigning for your party's support and nomination, the capture process requires internal selling for executive championship and financial sponsorship. Fund raising includes lobbying for New Business Acquisition Investment (NBAI) that can include early allocations of Bid and Proposal (B&P), or Research and Development (R&D) for demonstrations or product/service development.

Stage 3 – Developing your Platform (Proposal)

Campaign

The US Presidential campaign has a primary, similar to a Request for Information (RFI), Sources Sought, or other preliminary solicitation, that is a process to pare down the list of candidates to the "short list" of qualified businesses. As Richard White states, you must avoid being eliminated and write your proposal defensively (White, 2003). Once you get on the ballot and get down-selected as your party's nominee, the political national convention serves as the formal kick-off of the "proposal" effort. Every successful campaign has a political campaign manager that works with the candidate to develop a win strategy and a platform. This is often documented in a Campaign Plan. According to Carol Hess, "The purpose of developing a Campaign Plan is to outline how you plan to get a 50 percent plus 1 majority on Election Day. Developing a campaign plan is crucial to your success. The plan is your road map to Election Day victory. It outlines each step in your campaign from the time you decide to run until the polls close on Election Day. Problems always arise and campaign plans can be altered. What is important is that you have a plan outlining what you will do to win, how and when you will implement your strategy, and finally how much it will cost to win."

Within a Campaign Plan, the contact plan is the road map for which states (customers) to visit. In the proposal analogy, the Capture (or Campaign) Plan is a living PowerPoint document that is frequently updated and overly communicated. It should include the following 15 charts (see The Capture/Campaign Plan below).

The platform and individual planks constitute the message that resonates with voters and rallies support and endorsements from champions. The platform (win themes) is also the motivating driving force that inspires volunteers to go door-to-door handing out marketing material to pre-sell.

Newt Gingrich published a platform (similar to a Living Executive Summary (LES) brochure of win themes) in the Republican "Contract with America." This summary served as the proposed Program Plan outlining campaign promises for the first 100 days.

Like a Capture Plan, the win themes must:

- Be unique
- Hit the voters' hot buttons and provide value in their eyes (not yours)
- Make specific promises
- Have some "Wallop or Wow"
- Answer WIIFT – What's In It For Them? (the voters)
- Be realistic and believable
- Follow the KISS (Keep It Simple and Succinct) Theory

A classic example is the 1992 election in which Bill Clinton defeated George H.W. Bush. The simple, powerful bumper sticker theme was "It's the economy stupid." In his successful 1996 campaign, Bill Clinton used the theme of occupying the center of the political spectrum by positioning himself as the self-designated "New Democrat" (Selecting a President, 1997). "Clinton's improvisations worked to embroider his campaign themes, enriching his basic message with personal testimony" (American Presidential Campaigns & Elections, 2003). A campaign uses marketing material to pre-position and start to educate and win over the minds of voters.

Capture

Similarly, one suggestion is to develop some of the win themes and capture as your bumper stickers. To force brevity, document them on the back of a business card. As the campaign progresses, a powerful tool to use is the LES (Pugh, 2005, p. 113) to capture and

The Capture/Campaign Plan

- ☑ *Capture Team Leader and Members*
- ☑ *Account History*
- ☑ *Opportunity Overview*
- ☑ *Key Requirements (include most important requirements and hot buttons)*
- ☑ *Scope of Work and Deliverables*
- ☑ *Customer Evaluation Criteria (explicit and implicit)*
- ☑ *Competitive Analysis (from the Black Hat) – A Black Hat Review is when you have a person represent the competition and describe their Strategy, Strengths, and Weaknesses and how specifically they plan to beat you*
- ☑ *Win Strategy (including teaming)*
- ☑ *Top 3-5 Win Themes*
- ☑ *Price-To-Win (PTW)*
- ☑ *Our Offering*
- ☑ *Contact Plan for Decision Makers and Stakeholders*
  - ☑ *Who we see and when*
  - ☑ *Who sees them*
  - ☑ *Are they a supporter, detractor or undecided?*
- ☑ *Proposal Milestones (Kick-off, Baseline Review, Red Team, etc)*
- ☑ *Resources Needed (B&P, R&D, and People)*
- ☑ *Barriers to Success and Actions to Mitigate Them*

Caution: *Despite the many similarities, there are several ways that a proposal differs from a political campaign:*

- *In a proposal, you shouldn't attack a competitor by name. You can ghost your competitor or their approach just as long as you don't explicitly mention their company's name*
- *A candidate can campaign with vigor right up until the polls close and often sprints the last 24 hours; whereas a proposal effort often goes into a "cone of silence" quiet period when communication with the customer/evaluators must cease at formal RFP release. So Capture Teams must sprint hard until the RFP release and then use indirect communications such as press releases to convey messages during the proposal evaluation period*
- *A proposal must include all the backup and substantiation, whereas a political campaign can often get by based more on emotion and, often, less data.*

continue to build and personalize your messages. Proposal pioneers such as Beveridge (Beveridge, 1978) and others have identified key words that will help crystallize your win themes and write your proposal. These six phrases are powerful and must be addressed during the campaign and in the proposal:

- **Only** (this makes sure that you have some unique differentiators)
- **Why Us? (And why not them?)** (every author in every section must answer this question)
- **So What? (Or "Who Cares?")** (make sure that your point addresses a customer hot button and provides tangible and intangible value in their eyes)
- **Because** (Beveridge pointed out that starting sentences with the word "Because" was an effective way to link features to benefits)
- **WIIFT – What's In It For Them?** (this makes sure your value proposition is targeted at your customer/evaluators and includes value-added features or lagniappe)
- **Show Me!** (proposals should have quantified facts that substantiate and prove your claim. Any claims are weak and suspect unless you provide data and proof sources).

These words help run an offensive campaign. "A gospel for campaign managers is "Never wage a campaign defensively! The only successful defense is a spectacular, hard-hitting, crushing offense" (Mitchell, 1992). Kennedy had this experience when "emerging attacks on Jack's character and record put him on the defensive and distracted him from an affirmative appeal from the voters. In response, the campaign produced a "Counterattack Sourcebook" for use in answering derogatory assertions about Kennedy" (Dallek, 2003).

During this stage, it is important to get endorsements and third-party testimonials and loyal references from delighted (not just satisfied) customers.

Just like a political organization sets up a centralized campaign headquarters (HQ), you will be well served to have a dedicated proposal team and a physical war room (or a virtual proposal room and secure extranet). For example, the famed war room—a crisis-control center at the Clinton headquarters in Little Rock—coordinated rapid responses to Bush campaign charges (Selecting the President, 1997). A campaign has political strategists and spin doctors who equate to sales people/proposal managers/writers.

Another secret to winning proposals is to be concise and limit the page count. Likewise, the great speeches by politicians are short and powerful. Abraham Lincoln's Gettysburg Address was only 246 words. He was able to craft his message to resonate with multiple audiences. Similarly, complex proposals are written to multiple audiences such as the economic buyers, technical buyers, end-user community, and larger stakeholder community.

Stage 4 – The Debates (Orals and Q&A – Questions and Answers)

Campaign

During a campaign, often there is at least one debate. Richard M. Nixon may have lost the election to John F. Kennedy during the 1960 televised presidential debate. Aside from content, Nixon delivered negative non-verbal signals. Nixon "was tense, almost frightened, haggard looking to the point of sickness—he was half-slouched, his 'Lazy Shave' powder faintly streaked with sweat. 'My God!' Mayor Daley said, 'They've embalmed him before he even died.'" (Dallek, 2003). Nervous habits and appearance shifted votes to the more calm and confident-appearing Kennedy. This phenomenon is confirmed based on research by Dr. Albert Mehrabian of UCLA, whereby nonverbal language makes up 93 percent of communication as follows:

- Only seven percent what you say (content)
- 38 percent how you say it (tone of voice)
- 55 percent non-verbal body language (facial expression, posture, gesture)

During these debates, voters assess whether they trust and believe the candidate and how well they communicate.

- Simple sound bites are effective. "**Senator, you are no Jack Kennedy**" was a famous statement made by Democratic vice-presidential candidate Senator Lloyd Bentsen to Republican vice-presidential candidate Senator Dan Quayle during the 1988 vice-presidential debate. "Senator, I served with Jack Kennedy, I knew Jack Kennedy, Jack Kennedy was a friend of mine. Senator, you are no Jack Kennedy."
- Ronald Reagan's campaign generated the quote for the bumper sticker—"Republicans believe every day is the 4th of July, Democrats believe every day is April 15".
- "Likewise, Ronald Reagan succeeded against Jimmy Carter in the 1980 debates largely because of his style: the warm image he conveyed through his folksy anecdotes ("There you go again…") and the fact that he structured his answers in simple rhetorical terms" (Selecting the President, 1997).

For a bumper sticker to be effective, it must be substantiated by proof and quantitative back-up.

Three Elements of Communication

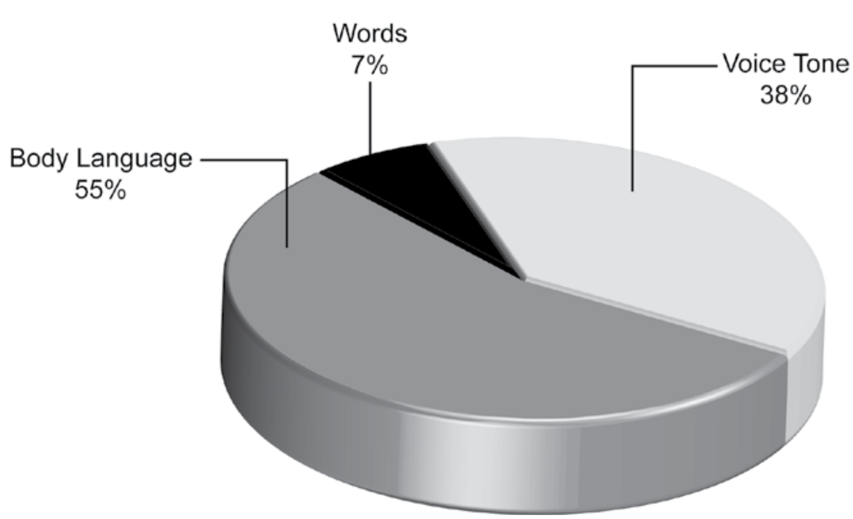


Figure 4. Non-verbal language makes up 93 percent of communication, with only seven percent of communication understood through your words.

Similarly, a hard-hitting phrase (such as "We'll Save you 40 percent in the Cost of Ownership") repeated in proposals has the same affect. However, for a bumper sticker to be effective it must be substantiated by proof and quantitative backup. Bumper stickers are claims that must be credible. Good debaters and speakers also share relevant stories to illustrate their points. This can be very effective at orals, and case studies can be powerful in the written proposal.

Campaigns involve question and answer (Q&A) sessions on TV shows such as "Meet the Press" or at local town-hall-style informal sessions. Just like a proposal Q&A, your answers are amplified as if under a high-powered microscope.

Capture

In capture efforts, the orals are the analogous event. Typically, each bidder is invited to brief their proposal and participate in a Q&A session. There are companies that specialize in preparation for orals and Q&A, such as TightRope Communications (www.tightropecommunications.com). Here are just a few of their tips:

- Develop an overall compelling story that captures the heart of your persuasive attempt
- Develop personal anecdotes/stories/illustrations to reinforce your overall story
- Your whole presentation needs to answer the three key questions: What do you HAVE to say? (RFP) What do you WANT to say? (Strategy) What do THEY want to hear? (Customer Analysis)
- Rehearse! Rehearse! Rehearse!

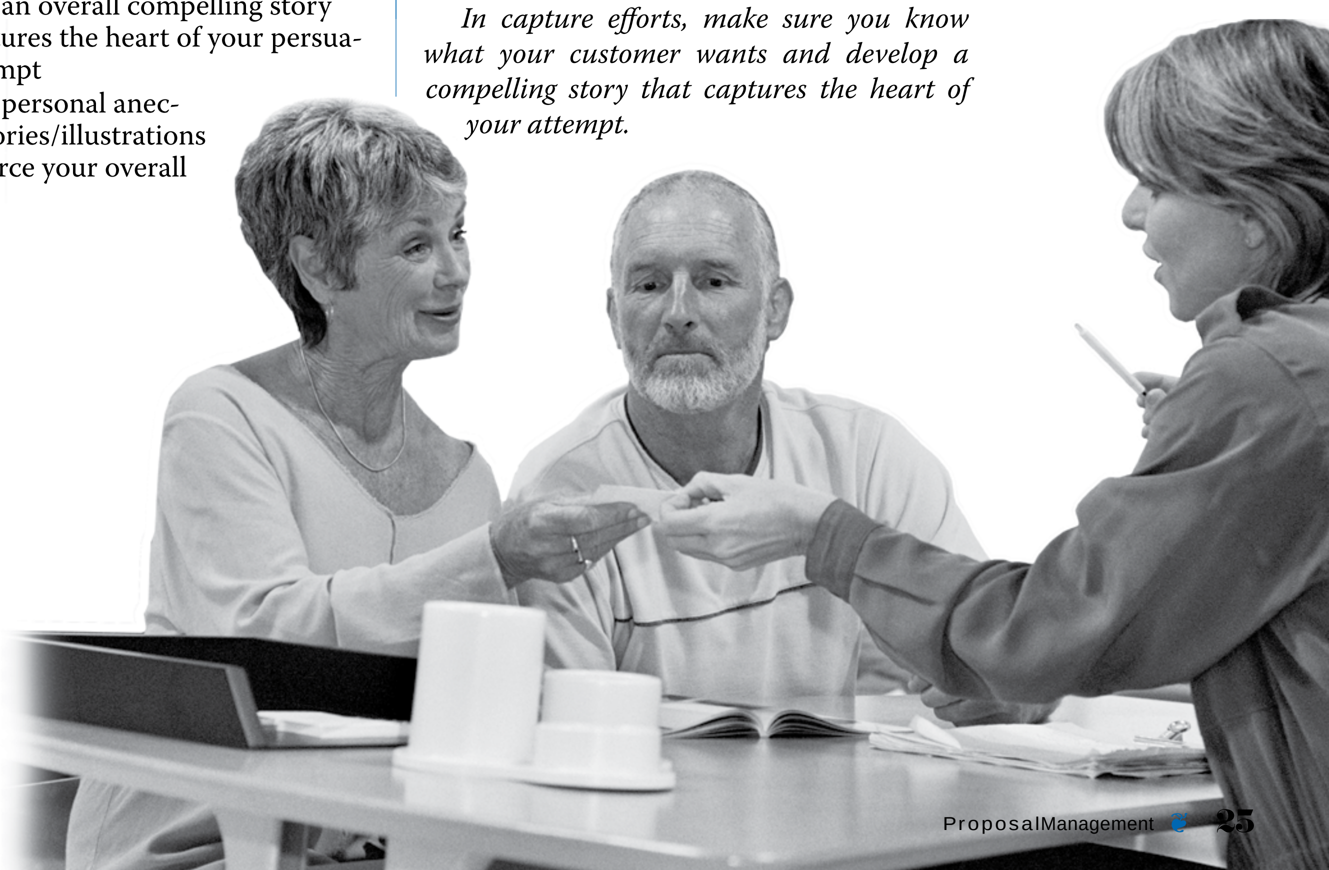
> *In addition to the "technical" scoring based on the platform and allegiance to a political party, votes are often decided based on emotions and trust.*

Stage 5 – Election Day (Source Selection)

Campaign

It all comes down to counting the votes and then determining the number of Electoral College delegates. In addition to the "technical" scoring based on the platform and allegiance to a political party, votes are often decided based on emotions and trust. Will this candidate fulfill my hopes and alleviate my fears? Does this candidate address my key issues and align with my priorities? Did the opposing candidate sprinkle FUD (Fear, Uncertainty, and Doubt) that my candidate (or running mate) can actually perform and meet his campaign promises? A classic FUD

> *In capture efforts, make sure you know what your customer wants and develop a compelling story that captures the heart of your attempt.*



example was the television political ad showing the bobbing line and bleep-bleep-bleep of an oscilloscope recording a person's heartbeat. Then the message: "Muskie. Agnew. Who is your choice to be a heartbeat away from the presidency?" (Napolitan, 1972). Voters ask "will this be a 'personal win' ensuring that my family and I will be better off in the future with this candidate?"

Another key point to winning is to make sure that you Get Out The Vote (GOTV). "A strong GOTV effort can put your campaign over the top, getting supporters to the polls that would never have gone if left to their own volition. Take the time and create strong GOTV drive for your campaign (Garecht, 2002)." The Capture equivalent is to make sure your supporters are either part of the evaluation committee or can appoint representatives.

A major win factor is whether you have a champion in a position to vote for your company—so GOTV.

A major win factor is whether you have a champion in a position to vote for your company—so GOTV.

Capture

Similarly, in a proposal voting process, the proposals are scored, and the Source Selection Evaluation Board (SSEB) brings a recommended decision to the Source Selection Committee (Electoral Delegates) or final Source Selection Authority (SSA). Like a campaign, emotions play a role and bias the scoring. In the battle of the "intellectual" vs. the "emotional" platform, the latter almost always wins. So, the way to win the battle is to make the voter or customer feel they are making the right choice for the right reasons. Voters will ask themselves: "Will I have a 'personal win' ensuring that my agency/company and I will be better off in the future with this vendor?"

Stage 6 – Post–Election (Lessons Learned)

Campaign

Don't declare victory too early! Remember some of the early headlines falsely claiming "Gore Wins" when Bush became President in the 2000 election or "Dewey Wins" when Truman won in 1948. Since the election results were a complete shock to the media, the *Chicago Daily Tribune* got caught with the headline "DEWEY DEFEATS TRUMAN." The photograph with Truman holding aloft the paper has become one of the most famous newspaper photos of the century (Rosenberg).

Often early front-runners end up losing—recall Governor Howard Dean in the 2004 Democratic Presidential nomination or Michael Dukakis who had an early 17-point lead over George Bush. You are in second place

Don't declare victory too early! Beware of "incumbentitis," and be paranoid—they really are out to get you!

until you receive the pen from the ceremony after signing the contract. There are no silver medals, and runner-up has no value. Beware of "incumbentitis," where you are over confident, complacent, and arrogant, which can cause you to lose. **The most regretted losses have been when the organization feels overconfident that the opportunity "is ours to lose." Be paranoid—they really are out to get you!**

After the results are in, sometimes candidates call for a recount or try to force a recall election. Even with the alleged voting irregularities in Florida and other issues, protests from neither Democrats nor Republicans changed the 2000 presidential election. Candidates will often perform a lessons learned review and run again to win the next election.

Capture

Similarly, after the results are in, some companies will protest or try to drive a rebid. My experience is that protests are rarely effective and only serve to delay and upset the customer. Unless the procurement process was flagrantly flawed and you can prove it, don't waste your resources on protesting. However, win or lose, you should ask for a formal debrief. For Federal Government bids, see Federal Acquisition Regulation (FAR) 15. After the debriefing and a Freedom Of Information Act (FOIA) request for the winning proposal, you should hold a lessons learned review meeting. The goal is to identify systemic issues and actions to improve the process and improve weak areas in your proposal or capture process. A popular phrase is: **if you lose, don't lose the valuable lessons. If you win, make it repeatable!**

If you lose, don't lose the valuable lessons.
If you win, make it repeatable!

Conclusion

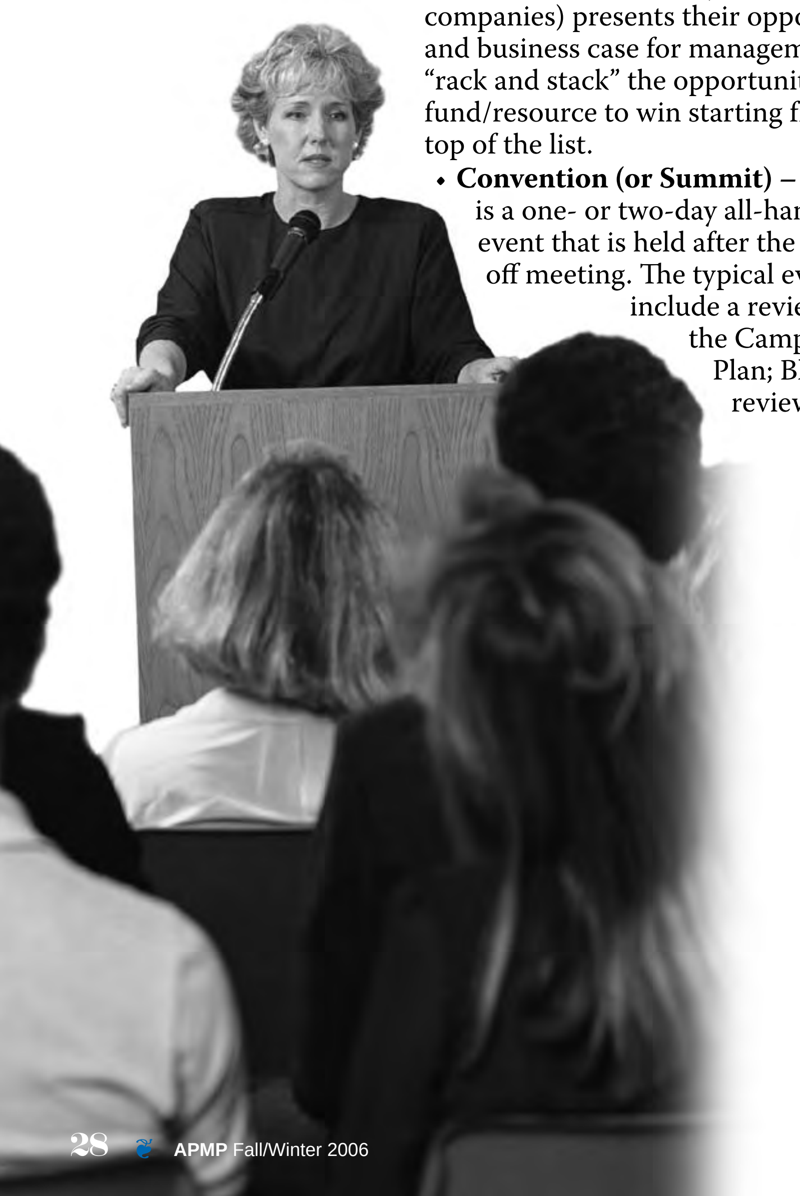
Remember, a political candidate would never be elected by starting his or her campaign the day before Election Day. Always run like you are behind and avoid the end-game only efforts. Don't wait to start your campaign until the RFP release—it is too late then! In principle, the next campaign starts the day after the current victory (this is particularly true when there is follow-on business). The next RFP you receive or proposal that you write, determine if you ran an effective *Campaign to Win*.

Understanding that a proposal is not just the activity between the RFP/RFS and submission or electronic upload of the document is well understood in the context of a campaign. Following the political campaign model will help turn your pursuits from just "writing a proposal" to running and winning a campaign. Proposals are not an isolated event (Pugh 2006), but rather are a culmination of earlier promises. Knowing how to *Campaign to Win* will result in your customer electing you for the job in a landslide victory. I'll see you and your organization in the Winner's Circle!

New Terms

One of the best definitions of business development is that it is "the management of perception" (Pugh, 2005). In order to apply the principles of a campaign and influence perception, the business development/capture/proposal profession needs to adopt a new lexicon of terms. Here is a start:

- **Campaign Plan** – this is a concept-to-contract Capture Plan. It's a dynamic, living document.
- **Bumper Stickers** – these are hard-hitting and easy-to-remember sound bites. "No New Taxes" may work in a campaign, and "Lowest Risk" may work for a proposal. However, the difference is that a proposal must provide proof and strongly back up this claim.
- **Fundraiser** – this is a meeting to prioritize all pursuits and decide how much funds to raise (or commit). Each campaign manager (by the way, I think this should be a formal job title in some companies) presents their opportunity and business case for management to "rack and stack" the opportunities and fund/resource to win starting from the top of the list.
- **Convention (or Summit)** – this is a one- or two-day all-hands event that is held after the kick-off meeting. The typical events include a review of the Campaign Plan; Black Hat review of the competition; and an update snapshot of the technical, management, and cost baselines.
- **Balance the Ticket** – this means finding a partner company or many teammates that form a consortium to win the source selection votes.
- **Platform** – this is a narrative document list that highlights positions and principles on important and often controversial campaign topics. Individual topics are often called planks of the platform. Candidates that flip-flop can lose credibility; some accused John Kerry of switching positions and waffling during the 2004 Presidential Campaign. Earlier in the 1960 campaign, Kennedy's staff put together "a nearly exhaustive volume of Nixon quotes," an analysis of contradictions and inconsistencies in Nixon's statements over the years (Dallek, 2003). To avoid toggling in a proposal, there should be a list of one-page position papers on controversial critical topics. There should also be a published list of "factoids" (such as the system's critical performance specifications) for authors. Staying aligned with these "factoids" will show consistency throughout the proposal and avoid contradictions.
- **Counterattack Sourcebook (CAS)** – this is for use in answering derogatory assertions from your competitors. It is not meant to dwell on a defensive campaign; it's just used to correct or turn around a competitor's claim to your advantage.
- **Rally** – this is an event during the process where everyone gets together to rally for the progress of a lengthy proposal effort. It should include the Capture Team and all of the support folks, such as proposal managers, graphic artists, and editors. Examples include holding an ice cream sundae social some afternoon or an impromptu barbeque outside the proposal center.



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How to Hire, Train, and Keep Qualified Interns

by Colleen Jolly

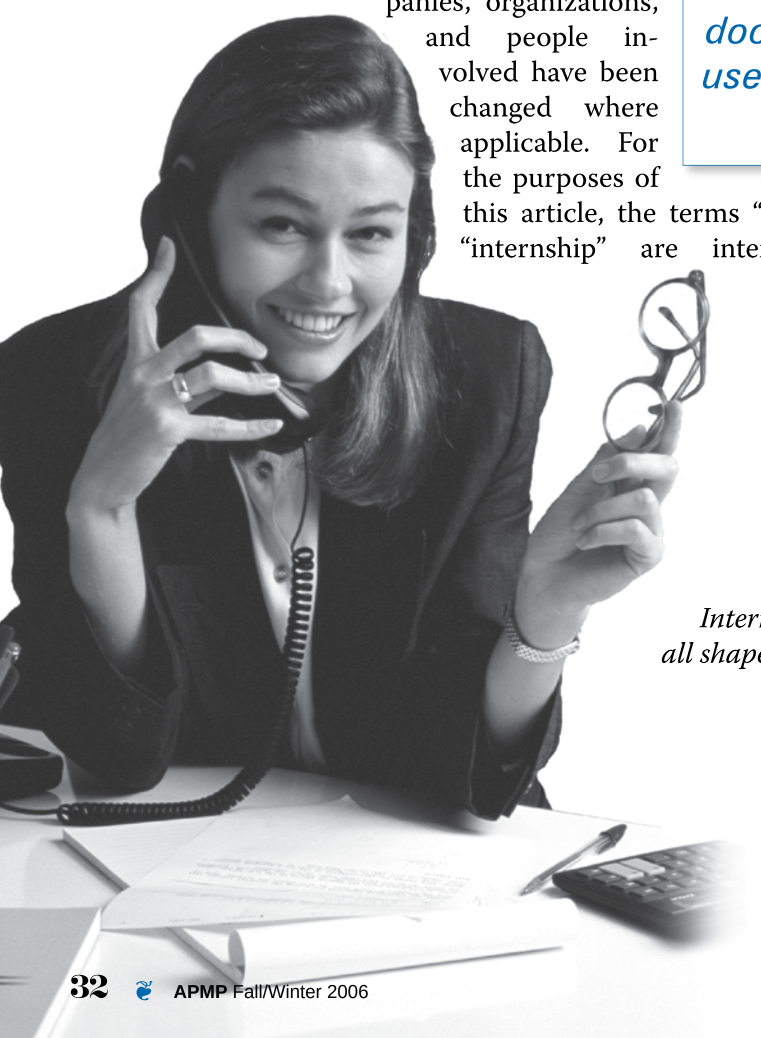
Interns and internships are an essential aspect of the modern workplace. Interns gain valuable real-world experience from employers that may translate to new job paths or act as a prerequisite to compiling a professional resume. The companies they work for also benefit—interns may be a cost-effective way to combat a seasonable peak or offer fresh insight into the hearts and minds of the incoming workforce.

Interns can be veterans of the workforce or completely new to it. Many interns join fields they are interested in learning more about while others are simply looking for a summer or part-time job. Whatever the circumstance, your organization will benefit from being prepared to hire, train, and keep qualified interns who can contribute to your corporate culture and skill mix, and positively affect your bottom-line.

This article addresses some common questions encountered when creating or updating internship programs, such as:

- What are interns
- How do I find interns
- How do I hire the right intern
- How do I create an internship program
- How much do I pay an intern
- What now – the internship is over (how to keep the best and brightest on staff)?

Former and current interns with a variety of internship experience in pay structure, industry, duration, and success were interviewed for this article. Specific details about the companies, organizations, and people involved have been changed where applicable. For the purposes of this article, the terms "intern" and "internship" are interchangeable with the terms/ideas: cooperative education or co-op; unpaid fellowships; unpaid residencies; apprenticeships; and other short-term, temporary employment with an emphasis on education, not monetary gain.



Interns come in all shapes and sizes.

I thought being a volunteer or intern would be a great way to get my foot in the door. I was not young, and used interning to speed up the learning curve.

What Are Interns?

When thinking about an intern the most common mental picture is of a college-aged person on summer vacation, dressed for the first time in a suit and for the first time entering "the Real World." These interns enter "the Real World" in all shapes and sizes, some encouraged by friends or family to explore career paths before declaring a major in college, some curious about a particular industry and building their professional portfolio of work experience and contacts, and some because of a mandatory requirement for their academic development (Purdue University in Indiana offers an elective in qualified internships while Marist College in New York requires internships for certain academic programs). These, however, are not the only types of interns. Many established professionals looking to make a career change seek out internships as a way to learn while minimizing potential risk. One former established professional-turned-intern claimed, "I thought being a volunteer or intern would be a great way to get my foot in the door. I was not young, and used interning to speed up the learning curve." Perhaps interns will find this path is not for them after all or, after enjoying the learning experience, engender trust (and possible full-time jobs!) from employers who were able to access the depth and breadth of an individual's experience for a low or no introductory cost.

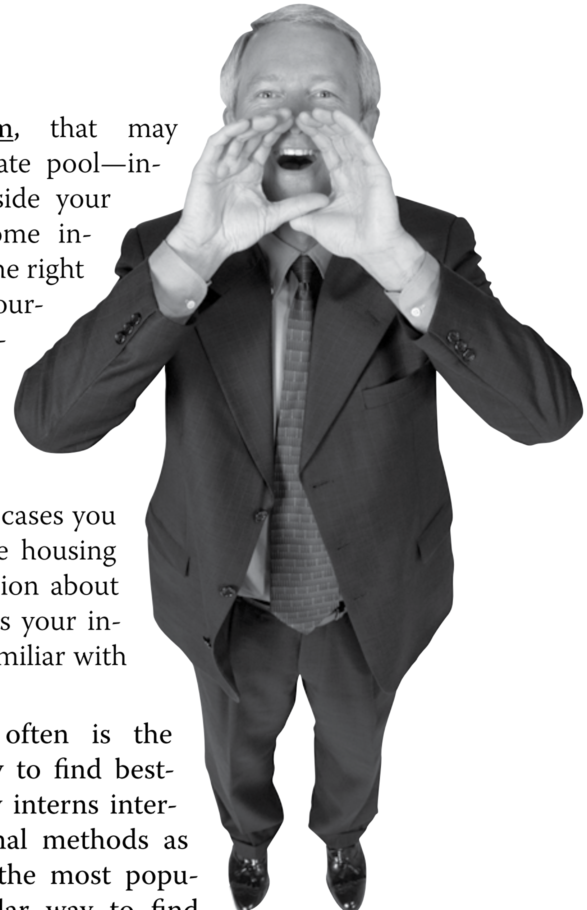
Interns, of both generationally disparate types, typically enter into an industry they are curious to learn more about while minimizing the potential risk of committing to a full-time position—for both themselves and their employers. Internships are set for a predetermined and typically small amount of time (measured in weeks and months, not years) and may be uncompensated or compensated less than a full-time position in the same (or similar) job function. In exchange for this work experience, interns are, more often than not, expected to do work not in their direct desired field, such as stuffing envelopes, running errands, collating papers, getting coffee, and other high value, low skill labor. One former marketing intern remarks, "…everyone LOVES interns. Most times they do the work no one else wants to do. It's like getting a new puppy – everyone wants to play with it. It's not like that when you join the real world—people don't view you as young and cute, they see you as a threat or competition."

How Do I Find Interns?

First try your alumni networks and contacts for college-aged interns. Many colleges and universities have career centers that sponsor career fairs and recruitment days, and may even vet qualified candidates for you, providing you with only the most applicable potential interns based on your descriptions of job function and/or desired professional personality traits (such as studiousness and organizational skills). The art department of University of Maryland, Baltimore County is one such proactive organization, matching organizations and students for optimal personality and skill level fit for both internships and full time employment. Having a direct connection at a university, temp-to-hire, or other organization that has immediate access to large pools of qualified candidates will dramatically improve your hiring process.

Everyone LOVES interns. Most times they do the work no one else wants to do. It's like getting a new puppy – everyone wants to play with it.

Next, try other more traditional routes (particularly if your desire is to find more established professionals) such as your industry networking contacts or posting ads on Monster.com, newspapers, and magazines applicable to your target candidate audience. There are a variety of intern-specific Websites useful for both potential employers and potential interns, such as www.internweb.com, www.internshipprograms.com, and www.internships.com, that may broaden the candidate pool—including interns outside your geographic area. Some interns will travel for the right position or be encouraged (by friends, family, professors, and other school officials) to travel for the right job or company. Know in these cases you may need to provide housing stipends or information about housing and travel as your intern will not be as familiar with your area.



Word of mouth is often the best way to find interns.

Word-of-mouth often is the most successful way to find best-fit candidates. Many interns interviewed cited informal methods as the most popular way to find internships, usually through a parent; professor; or other professional, adult resource. One former Capitol Hill intern promotes using both methods—formal to find the opportunity and informal to be hired. "Like any position on the Hill, I did a number of informational interviews and applied to a number of 'official' listings, but I finally gained my internship through an informal message from a contact with whom I had done an informational interview."

Once you find a candidate pipeline that works for you, stick with it and increase your visibility. If your most successful interns come from a particular school or university, become a featured speaker for classes or career fairs. If a networking group becomes the best source, become a speaker or sponsor an event. A majority of successful internship opportunities, like full-time employment, still come from chance meetings. One former intern answered an ad in the paper for a position at a non-profit; another walked into a company he admired and simply asked if they had a program.

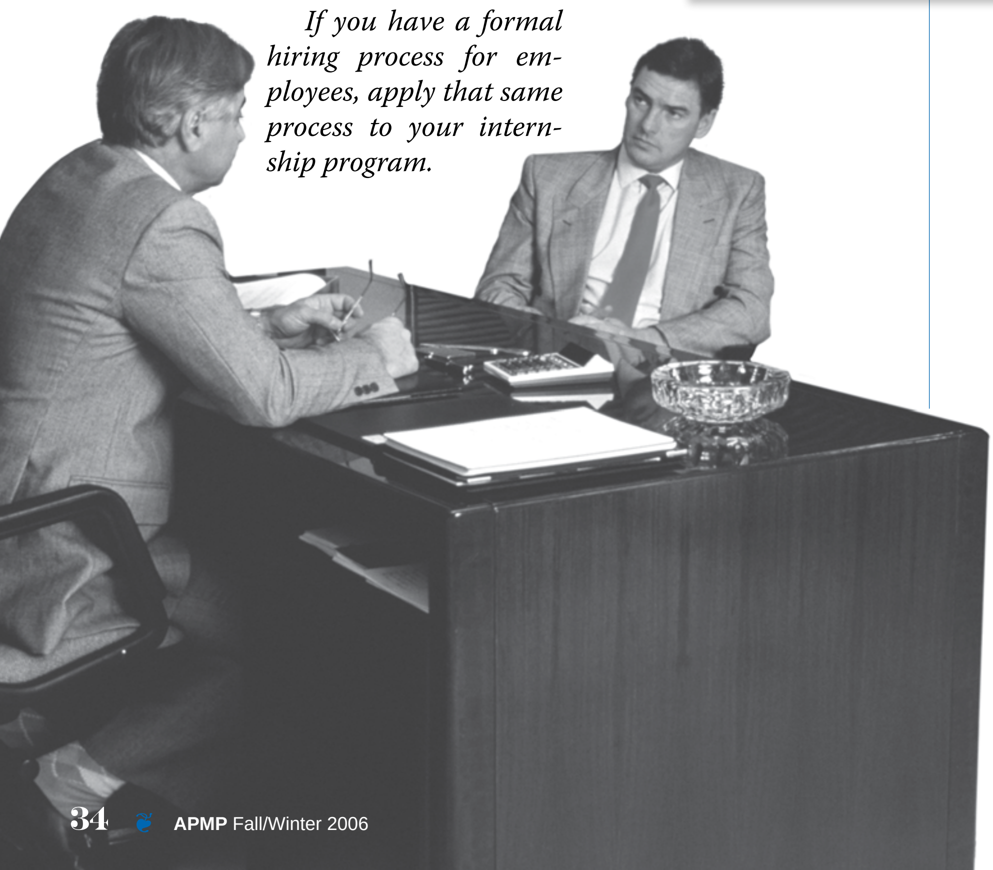
The best time to find college-aged interns looking for summer employment is in the early spring. Many colleges recommend internships to students on particular career tracks and encourage looking early—which typically is the beginning of the spring semester. Also, many colleges host career fairs during this time. For year-round internships or during other parts of the year place your ad or make initial contacts at least 7-10 weeks before your desired start date to ensure sufficient time to find and interview qualified candidates.

How Do I Hire the Right Intern?

The term "qualified candidate" is an important one. It is tempting to hire your son or daughter or to create a position for your boss' cousin's niece because they "need the experience" or would otherwise "be bored this summer." While many of us have stories like these (many are successful too!) first make sure you are addressing the following two criteria before committing to a hiring decision.

> *Do not create a position for a particular person or presume that since it's the summer you need to employ seasonal employees.*

If you have a formal hiring process for employees, apply that same process to your internship program.



1. **You are actually filling a need.** Do not create a position for a particular person or presume that since it's the summer and many colleges are out of session that you need to employ seasonal employees. Confirm that you have a need in function, and also confirm you have the ability to physically find, train, house (with desk, computer, and phone), pay for the time and resources from your current staff to accomplish these actions in a timely, professional manner, and pay or otherwise compensate your intern. You must also consider the time and energy lost or wasted from an intern who didn't live up to their full potential in the job function because you didn't provide a key element, such as asking them to answer phones but not providing a phone.
2. **You are actually hiring the most appropriate candidate.** It is very tempting to pick the first person that applies for your internship position, right? Internships, in many companies, are not considered high value positions and so do not typically garner the attention or time during the hiring process that a company would spend to hire a new Senior Vice President or someone of similar caliber. Remember that all positions in a company, from the janitor to the CEO, are important and the lasting impression you leave on the least influential member of your staff becomes their impression of your corporate brand and affects the way in which that person, their friends, their family, and anyone else they come into contact with also views your brand. Would you purchase a product or service from a company who had a bad reputation from the people it employed? It is also very tempting to force your family friend, the relative of a business associate, or other people you know personally into the mold you need. The best candidate in terms of attitude, skill, availability, and enthusiasm may be your son or daughter; however, confirm your suspicions by putting them through the same hiring

process you would put any candidate through. Remember that just as not providing the interns with proper tools to do their job costs you money, so does hiring the wrong person. A bad hiring decision can cost a company. "A truly bad hire – someone who is unstable, or undependable in performing his or her job – can be a financial and public relations disaster for your company…your negligence in making a hire will have exposed your company to unnecessary risk." (Rosner 120).

Treat **all** hiring decisions as seriously as your highest-ranking employee. If you have a formal hiring process for employees, apply that same process to your internship program. Prevalent hiring theories range from issuing your candidate a battery of personality tests to live-fire tests of technical skills to cognitive tests and more. Many companies spend weeks interviewing, testing, and reference-checking potential hires. A human resources consulting firm spends "up to four weeks, and tons of his worker's billable hours, per interview" (INC 97) and acknowledges that hiring the wrong person can cost "millions" in "not just salary but also missed sales and lost clients." (INC 97). The book **Top Grading** is a popular hiring resource, as is **Hiring Smart!**

Interns, while falling just shy of regulations for minimum wage requirements (depending on how your legal team reads their job function and employment status), are subject to the same Equal Employment Opportunity Commission (EEOC) laws governing safe work environments, sexual harassment, and discrimination based on gender, race, sexual orientation, age, and religion. Know the law of your particular state as well as any updated Federal regulations and check with a qualified legal advisor to confirm your hiring practices are compliant and legal for all employees.

How Do I Create an Internship Program?

In creating or updating your internship program remember to be very clear about the

Be very clear about your expectations for your intern program before you start the hiring and training process.

> *Treat all hiring decisions as seriously as your highest ranking employee.*

expectations for your intern and for your company including, but not limited to, desired skills brought with the candidate, desired skills to be learned by the candidate, hours per week per term worked, monetary or other compensation, and desired return on investment for both parties involved. For instance, you may implement a large database project and need assistance doing data entry or migrating old records. Identify the skills needed to accomplish this, such as general administrator/engineering/computer science, background (as appropriate) and strong attention to detail, at least 30 hours per week committed specifically to this project. Then identify the benefits to yourself and the intern. For the company, in this case, you finish a very important and very time-consuming advancement in infrastructure. For the intern, they see all of your client contacts and become familiar with your database structure. Beware of unintended consequences! If part of the benefit of your internship program is for your intern to meet and understand your industry connections, then having them sift through a database of your clients or potential clients is understandable. However, if it is not, then reassess the projects you assign your intern.

Not giving your intern any important or high-value/high-visibility tasks is a huge detractor and dissatisfier. Most interns interviewed expressed an understanding of having a percentage of their time devoted to high-value/low-skill tasks such as filing or getting lunch. However, the happiest, most successful, and repeat or full-time hires of those interviewed expressed a sincere joy for and appreciation of being part of the team. One former engineering intern who became a full-time employee claims, "In my second internship [at the same company] I was a full-fledged member of the design team doing the same work (mostly design validation) as other junior engineers. I had meaningful responsibilities with real impacts from Day 1 of employment." Interns who were not given "meaningful responsibilities" or who felt they were misled in the scope of their duties/responsibilities will negatively impact your ability to have a long-term (or short-term) employee relationship. One former medical intern who has since dramatically changed career path explains:

> "When working as an intern at a local nursing home, I thought that it was easy and would allow me to help others and have a family life. When I accepted [the position], it was a completely different story! My duties fluctuated every day, the gamut ran from lifting 300-400 pound patients for "scrub downs" and patient counseling and traveling companion to occupational and physical therapy assistant; none of which was part of my training! I was so disillusioned by ideal and reality that I decided to search out volunteer opportunities that would get me into another field. Because I was and am always willing to fill in, they piled it on, the responsibilities that is! I worked in every department they had, even in the office and one-on-one with some of the patients' families that the management was ducking."

Not giving your intern any important or high-value/high-visibility tasks is a huge detractor and dissatisfier.

The position was either not adequately described, or completely understood, and training and management support was noticeably absent. Not only did the intern leave the position AND the industry, but also, several years later, still discusses her previous employer with frustration and negativity.

To avoid leaving a potentially harmful lasting impression on your interns be very honest and clear regarding the position. Specify not only the basic function of the position, such as editing/writing, but also outline the additional functions such as ordering lunch, filing paperwork, and running errands. Give your intern an honest assessment of the percentage of time spent in both categories, such as 50 percent editing/writing, and 50 percent other administrative tasks. Give as much insight into your organization and process as possible before you hire an intern. If appropriate, include that information in any advertising for the position or at least in the interview process. Before Day 1 your intern should understand his or her basic responsibilities, the approximate break out of tasks they will be asked to do by days/hours/percentages, what skills you expect they are bringing with them, what training they will be expected to complete, and what resources (any type—managerial, software, hardware, and library) they have at their disposal.

Training

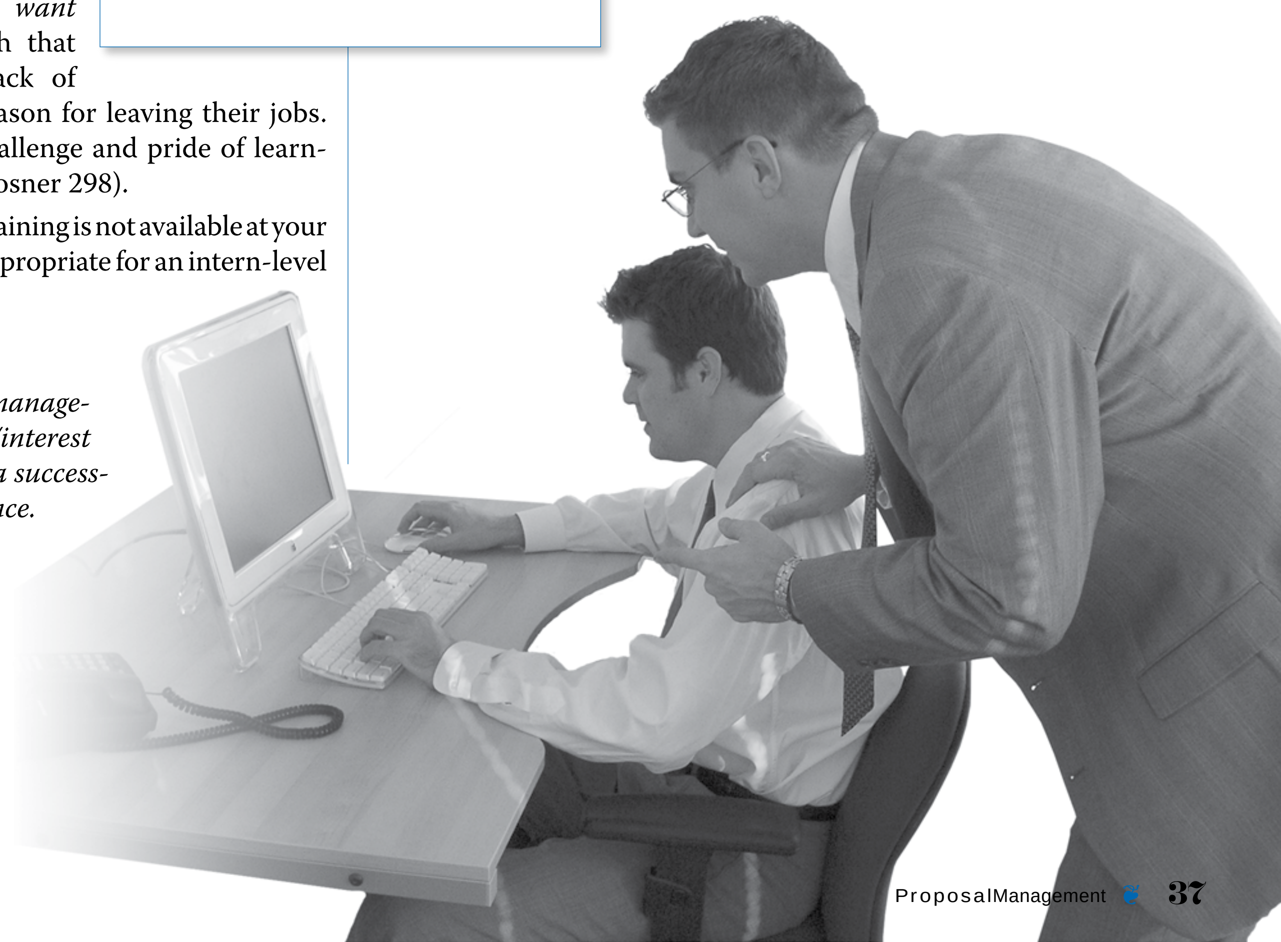
Effectively training your interns is crucial to ensure they are able to perform the tasks you assign them. Many organizations offer an in-depth, multiple-day orientation process that includes all vital information about employee pay/compensation and human resources structure (when/how often is pay day? check or electronic funds transfer? how to schedule time off? and other specific information to your company's processes), lines of communication and responsibility in the organization (to many college-aged interns, office hierarchies may be foreign and require extra attention to workplace-accepted behavior, dress, decorum, and acceptable methods/modes of communications), your company's best practices, and accepted industry standards. While much information about general office procedure may be skipped for many previously established professionals, do offer more information than less during training and orientation. Any person new to your organization may have prior experience that dictates responses to situations, clients, or other employees that is contrary to your best practices. For this reason, explain in detail all of the "hows" and "whys" of your processes. It may not be appropriate (or timely) to share all of the "whys" with every employee or intern, but when asked, provide substantive information and ask if the person sees room for improvement. "Training improves employee contributions. It creates better teams. It is also a tremendous retention tool. Employees *want* training; so much that many cite the lack of training as the reason for leaving their jobs. They want the challenge and pride of learning new skills." (Rosner 298).

Effectively training your interns is crucial to ensure they are able to perform the tasks you assign them.

If formalized training is not available at your company or not appropriate for an intern-level position, assign your intern a mentor—someone who can act as a guide, an advisor, and a navigator through your organization and industry. A mentor can offer interns information culled from years of experience in a more comfortable and personally tailored manner. If possible, assign your intern a mentor that has experience in the fields they are exploring, who communicates in a similar fashion (e-mail vs. phone, for instance), or who has some other connection they can build on—such as attending the same university. People will most often leave a job because of not building strong foundations with the people they work with, particularly those people in authority. "In a 2000 Lou Harris poll, 40% of people who rate their boss 'poor' said they would look for a new job within the year." (Rosner 7). You have the power to attract and retain qualified people through quality management and savvy people skills—you also have the power to push away and lose that talent.

Goals

After initially briefing your new interns on your processes and their place/function within



Training and management availability/interest are key to having a successful intern experience.

your organization, help them set goals and milestones for understanding, performance, and achievement during their internship. Use the SMART goal process: Specific, Measurable, Attainable, Realistic, and Tangible goals to help your interns create their own benchmarks for performance and learning. If your company, processes, or industry is not well known, your intern might need assistance creating appropriate goals. Let them be creative but not too over zealous or broad in defining their goals. Focus instead on the short-term, tangible learning experiences to be gained from the internship. When goals are set, help your intern design the steps to achieving those goals and outline the resources they have available. For example, if they would like to learn more about accounting and become an expert at a specific payroll software, let them know who your payroll expert is or where to find the training manuals. Then set milestones for achievement, expectations, and mini-performance reviews. Meet with your intern periodically at defined times to check in—this will put everyone at ease and clarify any misunderstood aspects of the position and their rate of achievement to goals before it is too late in the internship to change course.

Interns who aren't encouraged to achieve goals and aren't given enough training structure or enough management support will not have a positive interning experience and will not add value to your organization. Clarifying roles and responsibilities within your organization while providing the opportunity for your intern to creatively pursue their own SMART goals will offer the optimal balance

Create SMART Goals:

S: Specific
M: Measurable
A: Attainable
R: Realistic
T: Timely

Work with your intern to create SMART goals.

of return on investment for both parties providing the talents your organization needs while growing the next generation of potential employees.

An administrative intern laments the absence of goal and performance structure both in his organization and in his personal choices at his internship:

> "There is a great amount of freedom to learn through asking for specific experiences. If I had a set of goals and objectives that I wanted to achieve through my internship, I would have been able to ask for more challenging and beneficial experiences, and could have gotten even more out of my time as an intern."

Creating a culture of continual improvement and open lines of communication will benefit your organization through an increased sense of ownership and buy-in from your employees. "Your employees promise to achieve goals, and they make those goals their own. They internalize goals and then resolve to do whatever it takes to be successful. This is the ultimate. When employees buy in, they are most apt to work harder and look for ways to be successful. They are less likely to accept failure, to blame others, or to look for excuses." (Miller 56-57)

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Reviews

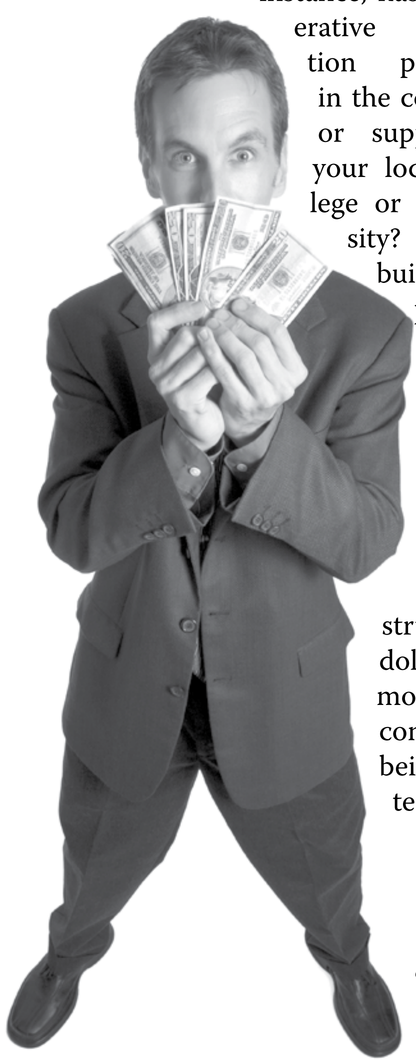
During all reviews, whether they are performance reviews, orientations, or other "check-ins" with your intern, be as objective and as positive as possible. Follow the schedule you initially establish with your intern and respect that people are often overcome by events, both personal and professional, that require moving or modifying meetings. Show your intern the same respect you would with any other employee and come prepared with the information necessary to complete the review in an effective manner. If you are not their direct report, have that person present or be fully briefed by that person on your intern's performance, both technical and professional. Capture specific incidents (both positive and negative) that are indicators of performance. When addressing a concern or praising your intern during a review remove all emotion from your voice and demeanor, comment only on the details of the situation, and be positive. Negatively approaching the situation or offering no methods for improvement or mitigators will only demoralize your intern. Remember, most interns are new not only to your company and industry but also the workforce and may not be aware of established, professional customs. If your intern is consistently unable or unwilling to improve a performance issue you have (positively) brought to their attention, such as arriving at the office chronically late, being unprepared, etc., you may need to fire your intern or otherwise part company. However, working closely with your intern on concerns and appreciating the value they add to your organization will often keep issues from escalating. Conduct all reviews of performance and areas for improvement behind closed-door sessions with only the most appropriate staff in attendance, but offer praise in front of other staff, particularly if your intern has succeeded in achieving a specific goal or curing a shortcoming. Bring your constructive comments to bear personally, but always share the victories with all your staff.

Treat your intern program creation and hiring process with the same importance and strategic value as you treat all your employment decisions.

How Much Should I Pay an Intern?

Consider your company, the responsibilities, and the learning opportunities of the internship you are offering, as well as the visibility of the position, the cache of the position as resume material, and/or the intern's potential to make valuable networking connections when deciding how much to pay a qualified candidate. If you offer a very sought-after, high-profile position for a company or organization that has a lot of word-of-mouth value and future potential, such as a Congressional internship or assistant to the CEO, consider offering non-paid internships. If you are offering a position with grueling hours and a high-demand workload, consider offering stipends, hourly compensation, or performance-based bonuses.

Also consider what factors are most important to your company in growing your internship program. Are you most concerned about having a person who is very available, or a person who is highly skilled? Are you most concerned about having an active internship program through a particular school for the name recognition (Georgia Tech, for instance, has the largest optional cooperative education program in the country) or supporting your local college or university? Always build your potential pay structure into your internship program from the outset and do not make payment decisions arbitrarily! Document why or why not your program is paid, then establish a range of potential payment structures with a high and low dollar amount separated by no more than 30 percent that is commensurate with the work being performed, the long-term benefits to the intern, etc. For instance, if your base compensation is hourly, justify and document an appropriate range, such as from $7-$9/hour for an engineering intern who will be learning database administration and is in the third year of an accredited engineering program. Defining a range for specific job functions allows you to reward candidates that are outstanding in a consistent, documented, and ethical way without destroying your budget.



If you offer a very sought-after, high-profile position that has a lot of word-of-mouth value and future potential, consider offering non-paid internships.

Do not arbitrarily assign a value to your internship—do your homework first and compensate equitably.

Interns recognize that in the short-term internships may not be immediately lucrative but offer significant long-term compensation, both monetarily and in preparation for the professional world. One engineering intern commented:

> "Co-op/internship experience is often counted as job experience at hiring companies. Raises are better and more often than your peers. Your first promotion may come before your peers. It allows you to make an immediate good impression upon your new peers... and that impression will last for as long as you are with that company."

But remember, while your intern may receive non-monetary immediate and future benefits from working at your company, the old adage "you get what you pay for" is often still true. If paying your intern is not possible, find out what would have them jumping out of bed in the morning to work at your company and then find a way to make it happen. Some interns might want to meet a specific person in industry, attend an event, or be recognized as a byline on a research paper or study—be creative and ask your intern what would be fair compensation. Negotiation is a good skill for you to practice and your intern to learn, and it also helps your intern feel ownership over their fate at your organization—and their future.

The Internship is Over — Now What?

After the internship is over always conduct an exit interview. Ask your interns what they learned, what they wish they learned, if the internship was accurately described, if it met their expectations, and would they intern again or accept a full-time position with your company (if appropriate). Think of the exit interview as a lessons-learned opportunity and approach it with as little emotion as possible. If you are truly looking to improve your organization, listen with open ears and follow up with your interns on any concerns they may have voiced. Some organizations conduct an exit interview up to three times—immediately after the internship or employment ends, then six months later (via phone if in-person is not possible), and then up to a year later. Distance often allows people to be more honest and to bring perspective to your processes once they've been exposed to other organizations' processes.

Hiring interns for full-time employment directly from your internship program is an extremely popular method to ensure high-quality technical skills and personality compatibility in a "try before you buy" scenario. Many interns seek full-time employment from their internship programs and will not intern again with the same company unless an increased offer—in both responsibility and compensation—is made. One serial intern comments:

> "Once you have completed an internship, to return to the same company/office after a hiatus and being compensated at the same rate for the same work is no longer beneficial to the intern and is only beneficial to the 'employer.' Presumably, I would have gotten as much experience out of the office during the first internship and the second would not improve my experience level. One should constantly move up in an organization if you're are going to return after a hiatus…"

As part of defining the criteria of your program, include the possibility of full-time employment and confirm your potential intern understands that the *possibility* of full time employment after a successful internship is not a guarantee—unless it is. Be absolutely clear in your intentions and do not leave your intern hanging.

If you do not renew the internship or hire your intern (or sometimes if you do) you may be asked to be a professional reference or to complete required paperwork for their coursework. Internships offer interns experience

Many interns seek full-time employment from their internship programs and will not intern again unless an increased offer is made.

After your internship is over its time to celebrate with your new coworkers!

that is "worth its weight in gold." One engineering intern claimed:

> "When I eventually entered the workforce I could tell who among my peers had participated in an internship or co-op program. Those that had were more confident, displayed more initiative and generally produced higher quality work. The same applied to me….If you can get an internship that provides real experience it is worth its weight in gold. It will propel your career and give an enormous advantage over your peers."

Be available to your interns and recognize the importance of your professional reference to their future career. Interns leave internships not only with valuable experience interacting in a professional environment, but also with possible portfolios or projects they can use for their resumes, as well as important resources and contacts.

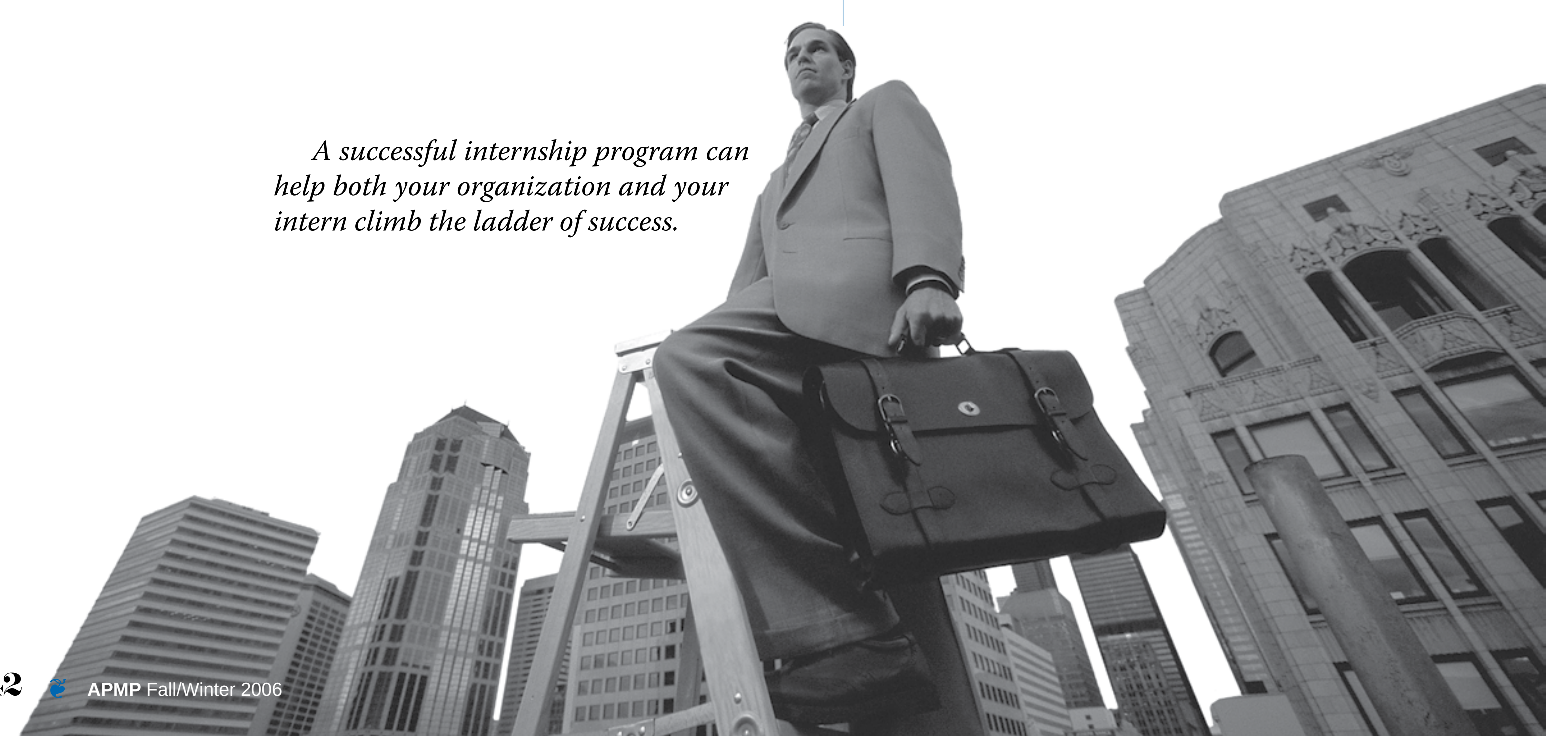
Conclusion

Interns and internships can be the lifeblood of organizations. From finding, vetting, and learning from new talent to providing a pipeline of qualified candidates for your organization, interns and internships are a mutually beneficial arrangement. Remember that the recommendations in this article are for the most ideal scenario! Do not be disheartened that you or your organization are not able to devote the time and budget resources to creating the best internship program ever. Focus first on the steps you can immediately take and set goals for increasing your benefit as an employer and decreasing your attrition from qualified candidates that walk through your door—in any variety. Enter into every hiring relationship, internship or otherwise, with as much honesty, respect, and clarity of purpose as possible. Relationships fail most often due to lack of communication. If you do not explain what you expect and what you are willing to give in return, you cannot reasonably expect a mutually rewarding experience.

While interns learn a lot from their employment opportunities, you can also learn a lot from your interns. Listen with open ears and a willing spirit to continually improve your processes. Both you and your organization will benefit immensely.

"Interning is the real world degree you get after traditional schooling."

Interning is the real world degree you get after traditional schooling.



A successful internship program can help both your organization and your intern climb the ladder of success.

Questions Asked Current and Past Interns

1. Did you participate in an internship program (if so please continue)? If not, why?
2. Were internships required for your degree program or career path?
3. Were internships recommended for your degree program or career path?
4. How did you find out about your internship program? Formally or informally?
5. Briefly describe your internship – number of hours required (ex 30-40 hours per week), duration and time (ex 3 months during the summer), pay structure (ex unpaid, hourly, stipend), work hired for (ex hired as a graphic design intern), work actually done (ex most time was spent filing papers)
6. Did your internship meet or exceed your expectations? In what way?
7. Would you intern for this company again? Why or why not?
8. Would you take a full time position with this company/organization? Why or why not?
9. Would you recommend interning (not necessarily for the company/organization you interned for) to others? Why or why not?
10. What is the long term benefit or lesson you take away from your experience?
11. What do you wish you knew now about the interning process and/or company that you didn't know before your first experience?

The author would like to thank all the interns interviewed for this article, particularly the past and current interns and employees at 24 Hour Company, Abby Miller (Wilner), author of *Quarterlife Crisis* and *The Quarterlifer's Companion,* and the members of the *Quarterlife Crisis* message boards (www.quarterlifecrisis.com) who contributed to this article.

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Survival Guide to Proposal Management
for New Proposal Managers
Chapter 1

A wonderful, very senior proposal manager once had me observe him on several large proposals in anticipation of my first effort as a proposal manager. He had checklists, repeatable processes, and a very detailed and well-published schedule. He also had the respect, even admiration, of everyone in the business unit, from writers to corporate management.

None of these things translated into my own first proposal management experience. Why? This experienced manager had proven that proposal management can be successful through the use of repeatable processes and good planning. However, following well-established procedures and checklists does not guarantee a successful first proposal. Even if organizations have the good foresight to mentor and guide their new proposal managers, those managers often face more challenges than their experienced colleagues… .

by Anna Gault Galjan

As we saw from the 17th annual APMP conference, an increasing number of people have identified themselves as new to the proposal management profession. Most of us don't realize that we've made our foray into the field until the first RFP hits our desks, but new professionals often have a unique opportunity to receive instruction and guidance early in their proposal management profession. Armed with a good understanding of proposal procedures, corporate processes, and where to turn for resources, however, they may still find themselves overwhelmed during their first efforts.

This is because there are some unique challenges to face and overcome in those first days. Both the new proposal managers and their managers and mentors can benefit by understanding these challenges and learning how to quickly overcome them.

This article discusses six best-practice suggestions to help the new proposal manager solve problems that cannot be solved by good organization and planning alone. New professionals should focus on these practices to ease their transition into the proposal management field. The best practices are: 1) Place emphasis on compliance and structure, rather than augmentation, for the first few proposals; 2) Lean heavily on the review teams; 3) Plan for, and insist on, daily communication with the entire team; 4) If possible, develop information sessions or informal seminars and use them to communicate your processes to the team; 5) Seek out more intense management buy-in and presence; 6) Seek out the support of a good mentor and a good advocate (who, in many cases, is not the same person).

New professionals often have a unique opportunity to receive instruction and guidance early in their proposal management profession.

Many senior proposal managers are ready with the checklists, scheduling tools, and processes new managers don't yet know.

1. Place Emphasis on Compliance and Structure

We've heard recently that fact-based storytelling is a compelling new/old selling technique in the marketing world (APMP Journal Spring/Summer 2006; Andelman, 2005). Facts fused together with a well-developed narrative naturally appeal to evaluators in their quest to distinguish a strictly compliant response from those that augment their responses with solutions to the customer's unstated requirements. A compelling anecdotal response, combined with quantitative solutions and metrics, will always be more compelling to read and easier for the customer to relate to. However, the ability to weave a good narrative takes experience which can take years to develop. For the first few proposals, the primary focus should be on ***compliance***; the narrative should be secondary. All winning proposals are first and foremost compliant even if they do weave a good story; no winning proposals are ever non-compliant. Therefore, it is logical to **perfect the art of compliance first**.

Most proposal managers, even new ones, know that compliance involves following the instructions in the RFP; if none exist, then follow the flow of the RFP as closely as possible. If you must deviate from this flow (for what would have to be extremely compelling reasons, such as a constrained page limit that requires some consolidation), make sure to clearly emphasize each requirement you are addressing, and reference the location of these requirements in the solicitation document.

However, if you have been presented with a completely disorganized RFP, it will be worth your while to gather your proposal team and create the outline together. You will likely have one or more members of the proposal team who are experienced contributors; use their insight and experience as a guide. After the outline is complete, filling in where each requirement is addressed will be easier. Make sure that you create a requirements matrix at this point to verify that all requirements are being addressed.

To focus your team on compliant writing and reduce pressure to deliver an elaborate narrative, instruct them to write concisely, with as few adjectives as possible. They should attempt, with every requirement, to answer the questions: 1) What is this requirement, 2) How will we achieve it, 3) What will be the results, and 4) Where have we done this successfully before? If your team can answer these four questions with most requirements, then you will likely have a compliant document. Even if it's not as exciting as it could be with elaborate commentary, perfecting this style of response first, and adding more narrative after a few proposals, is a logical way to proceed.

All winning proposals are first and foremost compliant even if they do weave a good story; no winning proposal is ever non-compliant.

2. Lean Heavily on the Review Teams

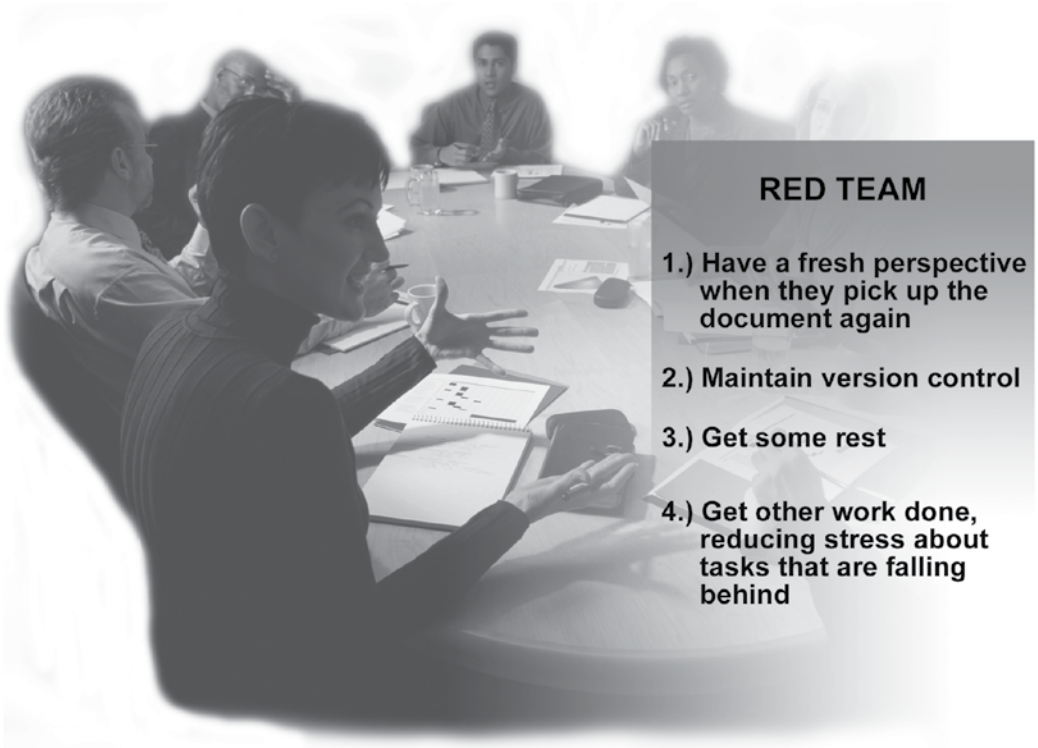
Review teams have the formal responsibility of evaluating a proposal from the standpoint of compliance, winning ideas, and good editing; however, their collective backgrounds can provide much more to the proposal process. They are not simply proposal evaluators. They are also valuable advisors, managers, and subject matter experts. In addition, they provide a fresh set of eyes and a new perspective. They are usually interested, and often invested, in the proposal outcome. The new proposal manager should seek out their help on a broad range of proposal issues. For example, they can:

1) Help the proposal team come to a consensus on baffling or ambiguous RFP requirements
2) Solve disagreements on how to present a solution
3) Solve disputes involving the outline or even the proposal schedule
4) Provide weight to a request for more resources overall or for a certain section.

The key to receiving sound advice, beyond simply asking for it, is to staff the review team appropriately:

1) Staff them in equal parts with knowledgeable subject material staff and experienced review team members (if you find both in one person, bonus!).
2) Have at least a 50 percent overlap of review team members at every review. A consistent team at review time means that you will not receive guidance that strays significantly from previous guidance, and save times if most members are already familiar with the subject material, previous versions of the document, and the RFP.

For your first few proposals focus on compliance and study your RFP!



Setting aside "pens down" time during a major review like Red Team allows the writers to take a break!

3) Staff them with reliable people. Review teams should include personnel who will commit to the sometimes lengthy exercise of reviewing a proposal document, providing a comprehensive debrief, and fielding questions from the proposal team.
4) Construct a proposal schedule that allows you put aside issues and wait for advice from the review teams. A schedule that is aggressive up front includes a meeting to dissect the RFP with all book bosses present and also includes a thorough kick-off or strategy/design meeting should help you to discover problematic issues in plenty of time to set them aside for review team advice.

In fact, setting aside contentious issues for an experienced group of people to resolve can save copious amounts of time. Don't be afraid to announce to a review team that you are new or that you are encountering difficulty with a particular issue; a good review team should respond appropriately, and augment their suggestions with background and clarification. Always declare a "pens down" for the proposal team during review times.

3. Insist on Daily Communication with the Entire Team

There is one unequivocal statement in this article—nothing is going to help your first proposal efforts like daily, verbal communication with the entire proposal team, and nothing is going to sabotage your efforts more than the lack of it. This not only helps your team get organized and look for direction from you, it also helps you gain a tremendous amount of learning from your team. Besides learning from the seasoned proposal contributors and managers, you also learn where team strengths and weaknesses lie, where good advice can come from, and where you will encounter resistance. It's where you find out that both Dick and Jane thought they were writing Section 1.1b, that no one is addressing Requirement 34.f, that resume writing is falling behind, and that past performance is ahead of schedule. Daily, verbal communication with the team is the only way to determine the current status of the entire proposal effort and to identify and resolve issues in a timely fashion.

> *Daily, verbal communication with the team is the only way to determine the current status of the entire proposal effort.*

A good approach is a 15-minute daily status meeting, or "stand-up," held every morning, although it could be held at any time of the day. It is not a working meeting; its focus is to determine status. Problems are discovered, not solved, and actions are taken.

The proposal manager must be aggressive in moving the meeting along; if a status report dissolves into a problem-solving discussion, you should table the discussion and schedule the proper forum to discuss it. A representative from each proposal section, including technical sections and cost, must be present at every meeting, and a manager must also be present. If someone is chronically late or regularly fails to appear, approach management without hesitation to resolve the problem.

4. Develop Information Sessions to Communicate your Processes

All proposal managers, both new and experienced, need to educate their teams about their own proposal processes, procedures, and definitions. Even if you are working with a seasoned proposal team familiar to you, there may be new writers or contributors to the particular proposal. In this case, you can't announce a red team and assume these people understand what this means, or refer to Section C or Section M and expect them to immediately think "scope of work" and "evaluation criteria." You will save much time by educating all team members up front. Orient them to your procedures, show them what your checklists and documents look like, tell them how you define certain terms, and stress the importance of milestones.

You do not need to be a seasoned proposal manager to do this, and you do not need to wait to a point in your career to settle on a firm set of procedures or documents. Simply explaining to the proposal team what you are going to do with ***this*** proposal will keep everyone on the same page. Without this, the right hand will never know what the left hand is doing. Before I ever managed my first proposal, I assembled an entire business unit for one hour and gave a 45-minute presentation on how I intended to run my first few proposals, explained the milestones and what they meant, defined certain acronyms, and showed sample outlines and schedules. I did feel nervous to be presenting myself as an authority, and, frankly a bit silly, but many people commented on how much it helped them understand how the proposal effort would proceed.

Daily status meetings are the only way to address concerns, track progress, and have all the members of the team know what the other members are doing.

5. Seek Out More Intense Management Buy–in and Presence

Proposal managers are not managers in the traditional sense. They do not hire people, they are not responsible for the programs under which most staff has been hired, and they do not control finances. They do, however, become the sudden center of activity when an RFP hits, demand a mass-mobilization of resources and monies, and develop aggressive schedules with virtual milestones. Even with good capture planning, the RFP release is usually the trigger for an intense period of large amounts of work, long hours, and stress.

Given these circumstances, the new proposal manager may well ask how to deal with problems that cannot be resolved through thoughtful discussion. The short answer is: have a manager present at all times. Do not waste time, beyond reasonable discussion, trying to reason with someone who wants to deviate from Section L because it "tells a better story," with someone who announces that they cannot meet deadlines, or with someone who is 20 minutes late every morning to stand-ups. It is management's responsibility, not the proposal manager's, to deal with impasses of a personal, financial, or management nature, especially when those impasses threaten the success of the bid. While it is the proposal manager's responsibility to request the resources necessary to submit a winning bid, it is the responsible manager within the organization that has to provide them.

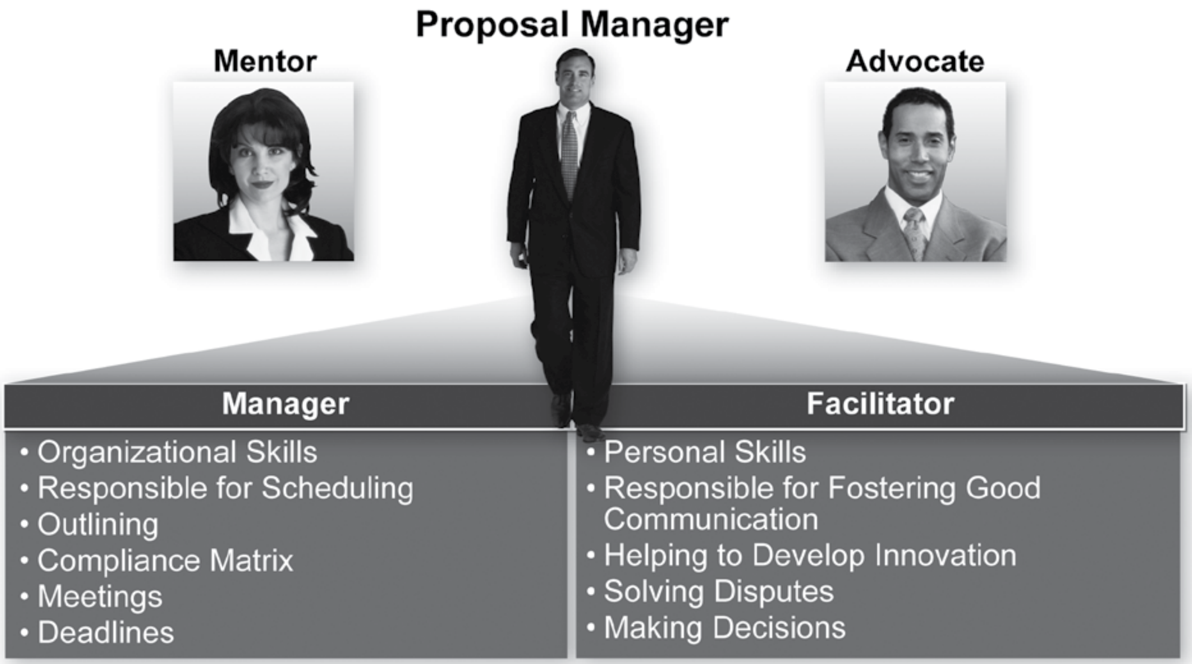
There should be one person within the organization who is your direct line to a responsible manager, and that advocate should immediately involve management's support if you request it. If continuous physical management presence is not possible, this is an excellent opportunity to involve senior management by including them on the review teams. If it is widely known that management will be taking the time to read everyone's material, proposal contributors may be more likely to better understand the importance of your scheduled milestones.

Occasionally, management itself may be inexperienced in the process of proposal development and milestones, and may not be as supportive as hoped. In these cases, inviting senior management from a teammate company to participate on the review teams often helps. I'll never forget the time that a senior manager was chronically late with his proposal input. Once I invited all senior technical staff from every one of our subcontractors to sit on the Red Team, he was never late with input again.

Proposal managers should have at least one person in their organization who can assist and promote a more structured response to proposals.

6. Seek Out a Good Mentor and Advocate

A good proposal manager is actually two people: 1) The manager, with his/her organizational skills, responsible for the proposal schedule, outline, compliance matrix, meetings, and deadlines, and 2) The facilitator, with his/her personal skills, responsible for fostering good communication, helping to develop innovation, solving disputes, and making unambiguous decisions in the face of ambiguous RFP instructions. Because the proposal manager is two people, it makes sense that he/she should be backed by two people, the mentor and the advocate.



Proposal managers have two personalities, the manager and the facilitator, both of which are supported by two additional personalitites, the mentor and the advocate.

Mentoring is a long-standing formal or informal tradition in many organizations and relationships. It is traditionally defined as having a more experienced, often senior, member of a trade provide guidance, instruction, praise, constructive criticism, protection, and opportunities over a period of a person's career. The mentor's long-term goal is to promote the protégé within an organization or professional field, ensuring opportunities for professional growth and helping to increase the protégé's responsibilities and achieve increasingly successful results. Allen (2003) also emphasizes that mentoring is an excellent way to pass information down to the next generation.

> *If you are the senior staff member, you should be the one to approach the new proposal manager to discuss entering into a formal mentor/protégé relationship.*

Most mentor/protégé relationships within an organization are initiated and cultivated by the mentor. This is logical, since young professionals may lack either the initial confidence necessary to approach a senior staff member or the awareness that formal mentor/protégé arrangements exist. If you are a new proposal manager and would like to approach someone to be a potential teacher and mentor throughout your career, you should do so! Try to identify someone whose leadership style is similar to yours, who you enjoy learning from, and who might be interested in watching and promoting your career.

If you are the senior staff member, you should be the one to approach the new proposal manager to discuss entering into a formal mentor/protégé relationship. As a potential mentor, you should be prepared to commit the time and energy to this worthwhile project, be genuinely interested in the new proposal manager's career, and have the communication skills to encourage, constructively criticize, and promote your protégé.

The dilemma in our profession is that the mentor is often not the person able to provide the new proposal manager with resources, writers, budget, and conflict resolution required on a proposal-by-proposal basis. For this, the proposal manager must also have an advocate. The following sections speak to the mentor and to the advocate. They summarize some common elements of mentoring and advocacy and outline some unique issues associated with mentoring and supporting a proposal management professional.

The Role of the Mentor in the Proposal Management Mentor/Protégé Relationship

Kram (1983) describes the phases of the mentor relationship as: 1) **Initiation**, where the protégé's talent is identified and the formal mentor-protégé relationship begins; 2) **Cultivation**, where the interaction, coaching, protection, and promotion are most intense; 3) **Separation**; and 4) **Redefinition**, where, after enough time has passed, the formal mentor/protégé relationship naturally comes to a conclusion, possibly evolving into friendship or a more peer-oriented relationship.

As a mentor to a new proposal manager, how do you approach this commitment, knowing that one key element of traditional mentoring, **protection**, often cannot be offered on a daily basis? In this case, the focus shifts towards teaching self-sufficiency. Johnson and Ridley (2004) write: "The best mentors understand that protégés need to watch them perform the activities necessary in a particular field. They appreciate the fact that some complex professional behaviors (e.g. writing a grant, running a meeting, or pitching a proposal to a client) can only be learned by observation. In some settings, the code of professional conduct is largely tacit and unspoken—requiring the mentor to quietly teach and demonstrate the art of communication and success in a world largely foreign to the protégé."

> *As in any field, your ultimate goal as mentor is to be a role model for a potential future company asset.*

Approach the mentoring situation logically by providing protégés as many tools as possible: allow them to "shadow" or observe you as you manage proposals, then allow them to coordinate and author a section, and finally encourage them to manage their own proposal. Through watching you, the new proposal manager collects three important pieces of information. First, they will observe, then analyze, and finally select and personalize, the tools that you use, such as templates, procedures, and spreadsheets. Second, they will observe your "soft skills," such as diplomacy, conflict resolution, methods of encouraging dialogue, and methods of supporting the team. Third, they will watch how you manage your time, balance work and personal life, and stay healthy throughout a proposal. During their first few proposals, they will likely mimic a lot of your techniques. This type of emulation should be construed as flattering; allow them to digest as much information as they need, allow them to use what they need to manage their first proposals, and accept that they may ultimately reject or substantially modify some of your methods to conform better to their style of management.

After your protégé's first few proposals, help them to evaluate their performance. The proposal management field is unique in how quickly a proposal manager's skills need to develop, mostly because of the pace of proposal development that involves every department every time. Six months in the fast-paced proposal development field can be the equivalent of years of experience in other fields, in terms of getting to know your organization and your team, learning how business is won and lost, and learning how to use your resources effectively. Therefore, help the protégé assess the following: 1) How is their role as a manager maturing? 2) What could make their job easier? 3) What additional tools could they use? 4) What interpersonal skills could they improve to enhance teamwork? Help them address these issues, provide them with plenty of praise, and continue to provide additional tools and literature to empower them to be effective in their field.

As in any field, your ultimate goal as a mentor is to be a role model for a potential future company asset. You develop this asset by instilling in your protégé the confidence to creatively and decisively run successful proposal bids. However, a mentor/protégé relationship has one other interesting goal. Unlike law, science, or medicine, proposal management is not a field that one traditionally aims for as a student or new professional.

With help from their mentor, the protégé must develop a sense that they have entered a **profession**. Once this realization has occurred, the mentor should help the protégé start contributing to the field by researching new trends, attending conferences, reading literature, and seeking to improve their methods on a proposal-by-proposal basis.

Fagenson (1989) reported that "mentored individuals reported having more career mobility/opportunity, recognition, satisfaction, and promotions than non-mentored individuals." As a mentor to a protégé, remember to renew your commitment often to this important relationship; it may be the defining relationship in a new proposal manager's career.

The Role of the Advocate in Proposal Management

The advocate is the person who has a direct line to a person, or is the person themselves, who helps the proposal manager obtain the resources and management support required to submit a winning bid. The mentor provides guidance and resources throughout the protégé's career; the advocate provides tangible support on a proposal-by-proposal basis. All proposal managers should actively identify who their advocate will be on each bid, and these advocates should actively support the proposal manager, especially the inexperienced one who may express hesitation when asking for help.

The advocate should be prepared to request or provide resources required by the proposal manager, intervene to help resolve issues, and help with other proposal management logistics, such as providing office and meeting space. The establishment of an effective advocate/proposal manager relationship can be as important as the longer-term mentor/protégé relationship because it is one of the most important factors helping the proposal manager and team produce a winning bid. As with the mentor/protégé situation, the advocate should be prepared to invest the time necessary to make sure the proposal manager receives all required resources.

Conclusion

It's hard to say whether anyone is ever really prepared for the first proposal management experience. Good familiarity with corporate processes and procedures helps, as do prepared compliance matrices and organized checklists. The best practices suggested in this article can also help by preventing pitfalls that are difficult to foresee. Interestingly, all of these practices contain one common element: actively seeking participation, help, and consensus from your proposal team. Open communication between everyone, from mentor to advocate to manager to writer, helps ease your transition into the proposal management field, and, hopefully, enjoy it.

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Getting Proposal Graphics Right the *First* Time

by Michael Parkinson

Sound familiar?

You're not alone.

These are issues that my company frequently encounters when starting a new proposal. To overcome these challenges, I created six mitigating strategies. These strategies can save you time and money, reduce hassles, and increase your chances of winning!

The six strategies are as follows:

1. Make the designers part of your team
2. Storyboard
3. Leverage existing graphics
4. Evolve the concept before rendering the final graphic
5. Use a template
6. Make the graphics customer focused.

When you apply any of the six strategies to your proposal, you will see a decrease in team stress and an increase in production speed. The design process will be more enjoyable, and your team will deliver more communicative, successful graphics faster than ever before. The graphics generated will quickly capture and communicate the right solution and the right messages. As you apply more strategies, the odds of developing a winning proposal grow. Bellow is a detailed explanation of each strategy. You will see why they matter and how each contributes to getting graphics right the first time.

According to Dale Carnegie Training, we want to use graphics to explain complicated concepts. Graphics allow the audience to follow at their own speed. Visuals accommodate all learning styles.

1. Make the Designers Part of Your Team

Everyone on the team should share the same vision, mission, and goals. For that reason, involve the designers as early as possible. Make them a part of your proposal team. No piece of the proposal should be regarded as insignificant. Like authors, designers communicate vital information. The less they know about the proposal, the less likely they are to communicate the right message and the more likely that there will be disconnects, miscommunication, and lengthy reiterations of the same graphic. To ignore this fact is to give your competitor the advantage and drive both your production and authoring costs through the roof.

The designer, as well as the rest of the team, must know the role they play, what is expected of them, and understand the "big picture." What are the customer's needs? What are their challenges? What is the customer really looking for? What are the customer's goals for the larger organization, their team, and their direct reports? What are the customer's hot buttons? What does the customer care most about? What is the customer's greatest fear? What terms do the customer prefer or dislike?

Designers and other teammates may have difficulty synergizing. If so, remind the team that they are working together for a common cause. Dysfunctional teams never realize or acknowledge that every aspect of the proposal is extremely important, as are those persons responsible for each piece. No single person can do it all. Therefore, to deliver a quality proposal, cooperation is paramount. The more the team cooperates, the easier the process becomes. Conversely, the more the teammates keep to themselves, bicker, or gossip, the more challenging the process.

Make your designers a key part of your team.

Each teammate must know why this proposal matters to them. Make sure all involved in the proposal effort know what's at stake and what's in it for them. Consider the following:

- A loss will cause a reduction in revenue. It may eventually lead to lower wages, fewer benefits, and company-wide layoffs. Many employees are counting on this team
- Winning may be directly rewarded with a commission or bonus
- Excellent team performance plays a large role in evaluating your future compensation.

Involve the designers early and make them part of your winning team. Your payout is immeasurable.

2. Storyboard

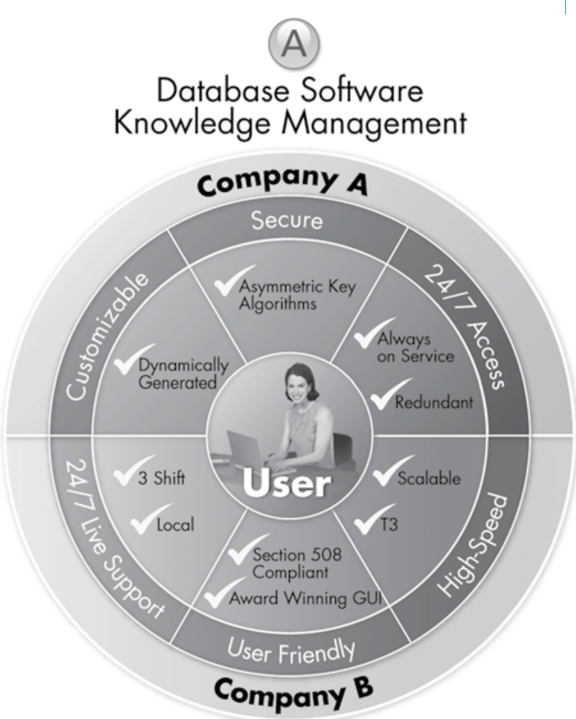
Storyboard your project. Agree to the story that you will tell in the proposal before writing and developing graphics. Have the designer create graphics that address the solutions proposed for each of the major areas. Which would you rather write to—A or B? *(Figure 1)*

Finding a story and solution that everyone agrees to during storyboarding is key to getting graphics right the first time.

This technique will allow all authors to write to the same depiction of the solution. "If you cannot picture it, you cannot write about it," says Mike Conk of Buchanan & Edwards, who has worked in the proposal industry for 17 years. Developing an overview graphic forces the authors to analyze the information and organize it in a way that is logical, easy to follow, and easier to write to. The more information revealed during storyboarding, the lower the risk of lengthy rewrites and lost graphics. Finding a story and solution that everyone agrees to during storyboarding is key to getting graphics right the first time.

3. Leverage Existing Graphics

The third strategy is leveraging existing graphics to create new, project-specific visuals. Typically, each company has an existing process, tool, and/or approach for handling each topic discussed in the proposal. Aspects will need to be tailored for the current proposal, but referencing or starting with a depiction that has worked in the past is a smart move. Most



B

Company A is Responsible for Tasks in Support of the User:
- Software Customizable by User
  - Dynamically Generated Information
- Security of Information Processed by the Software
  - Asymmetric Key Algorithms and Encrypted Information
- Reliable 24/7 Access to Software
  - Always on Service, Always Available to Users Worldwide
  - Redundant

Company B is Responsible for Tasks in Support of the User:
- 24/7 Live User Technical Support
  - 3 Shifts of Technical Support Specialists
  - Uses Local Staff
- User Friendly Software
  - Compliant to Section 508 Regulations
  - Award-Winning Graphical User Interface
- High-Speed User Access
  - Scalable to Handle Increases in Demand, T3

Figure 1. Use storyboarding techniques early in the proposal process, and use visualization to assist your team in writing your story.

authors struggle with thinking graphically. Attempting to develop the solution with no more than a blank sheet of paper or screen is unnecessarily challenging and time consuming. Instead, start with an existing image of a solution that worked in the past. This step will save hours and reduce stress, and the solution will be more thoughtful (benefiting from the evolution of the ideas/image as it is passed from one proposal to the next).

Picasso once said, "good artists copy but great artists steal." In other words be smart and use what others before you have learned.

4. Evolve the Concept Before Rendering the Final Graphic

Proposals require long days with light resources. The fourth strategy mitigates this common challenge. Proposals are driven by tight deadlines. If there is no time or money to evolve the graphic, the author should ensure that the idea is as far along as possible by reviewing the concept with the other subject matter experts/authors or the Volume Lead to verify that it answers the addressed question before assigning it to the designer. In turn, the designer should learn all that he or she can about the concept before creating the final rendering. The designer should sketch the solution first and present it to the author for approval. To ensure agreement on the graphic, the author should then get approval from the other subject matter experts/authors/Volume Lead. If they agree, the graphic can be rendered. If not, tweak the graphic on paper until everyone agrees. The graphic is now ready to be rendered on the computer *(Figure 2).*

According to studies performed at the University of Pennsylvania, The Wharton School of Research Center, the University of Minnesota, Management Information Systems Research Center, and 3M:

- *People agree more with a position when presented with visuals.*
- *People will pay closer attention and react better when visuals are used.*
- *The quality of a meeting is affected by the use of visuals.*

5. Use a Template

Using a template reduces the need for last-minute formatting passes. It works every time. Agree to and use a template that defines all variables of the graphics at the beginning of the project:

- Color (primary, secondary, tertiary)
- Fonts (style for titles, subtitles, graphics, and content)
- Graphic style (i.e., vector, raster, silhouettes, and effects)
- Lines
- Capitalization (bullets, titles, and content)
- Arrows
- Log numbers
- Section L&M requirements.

Make sure a Volume Lead and/or the Proposal Manager reviews the template with special attention to any relevant L&M criteria. Ensure all designers strictly adhere to the approved template *(Figure 3).*

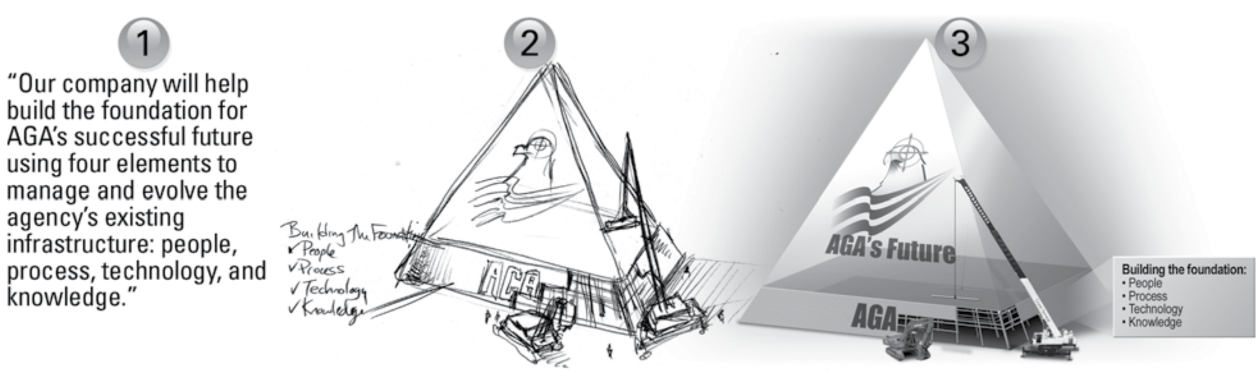


Figure 2. Evolve your concept first with words, then on paper to ensure buy-in up front.

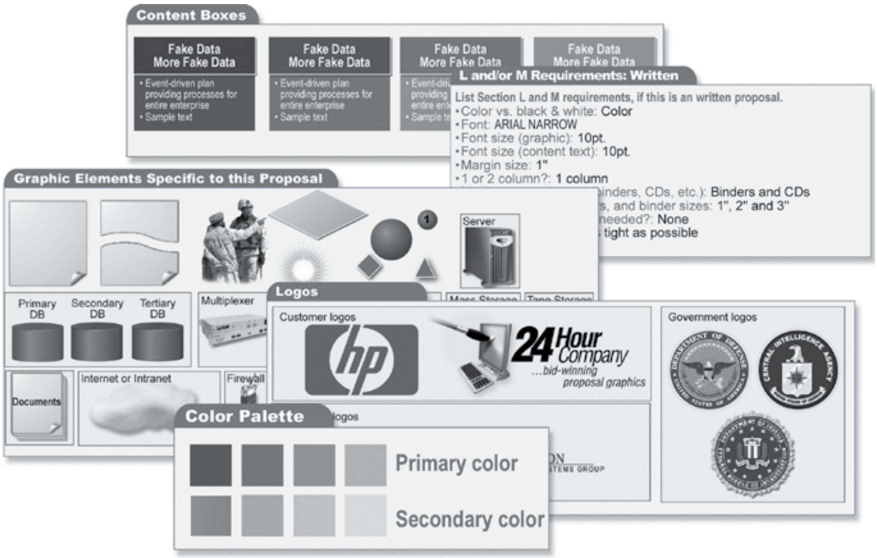


Figure 3. Create a template early in your process that captures all possible proposal variables.

6. Make the Graphics Customer Focused

The authors and designers must make the graphics customer focused. What is it about the proposed solution that solves the customer's challenge? Reference your answers to the issues raised in the RFP. Make it obvious. Studies have proven that graphics will communicate faster and be remembered better than text. Use this to your advantage. Highlight your features, benefits, and discriminators.

Ignoring your customer in your graphics often results in "bloody" review teams or worse—a loss. Robert S. Frey, author of *Successful Proposal Strategies For Small Businesses*, advises proposal professionals and presenters to make sure that customers see themselves in their proposal. If you are proposing a new satellite system for the Army, use images of Army personnel in the field or, if possible, using your satellite equipment. Employing this strategy when creating presentations has proven invaluable to all who embraced it *(Figure 4).*

Follow these six strategies and you will find that getting graphics right the first time pays great dividends. You will see an amazing reduction in stress, time, and money for graphic (and proposal) development and an increase in your win rate!

Figure 4. Make information obvious to the viewer—identify and highlight your features, benefits, and discriminators.

Michael Parkinson is a Principal at 24 Hour Company, a professional proposal graphic and production company in Falls Church, VA. He is also a professional public speaker and visual communications trainer. He has published several articles and two books titled *Billion Dollar Graphics: 3 Easy Steps to Turn Your Ideas Into Persuasive Visuals* and *Billion Dollar Graphics: 40 Powerful Ways to Show Your Ideas*. Michael can be contacted at mike@24hrco.com.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The Legacy of Peter F. Drucker

By Jayme A. Sokolow, Ph.D.

On November 11, 2005, Peter F. Drucker—the father of modern management—died at the age of 95. He was the best-known writer about management in the world with more than 30 books, two novels, an autobiography, and hundreds of articles published over a 60-year period.

What is his legacy to proposal professionals?

**Images of Peter F. Drucker courtesy of Claremont Graduate University.*

A Man of Vision and Influence

When Peter F. Drucker died last year, scholars and business leaders hailed him as the management guru of the twentieth century. According Andrew Grove, the co-founder of Intel, "Drucker is a hero of mine. He writes and thinks with exquisite clarity – a standout among a bunch of muddled fad mongers." When Bill Gates was asked which management thinker influenced him the most, he replied, "Well, Drucker, of course."

Stephen Covey also admired Drucker and described him as "truly the Renaissance Man of the field of management." These comments were echoed by many scholars in the field of management.

Drucker even became a hero in the West Wing. According to Karl Rove, the president's long-time advisor, President Bush is an outstanding example of a person who manages by objectives, one of Drucker's principal recommendations for successful management. Rove told the *Atlantic Monthly* that he had never truly understood Drucker until he "saw Bush in action."

> *Drucker's fascination with organizations appeared in his earliest book, published on the eve of World War II, and it continued unabated for more than six decades.*

Drucker once illustrated his approach to the study of management with a story. Once three stone cutters were asked what they were doing. The first replied that he was making a living. The second kept on hammering while he said, "I am doing the best job at stonecutting in the entire country." The third one looked up with a visionary gleam in his eye and simply stated, "I am building a cathedral."

According to Drucker, the first man understands his task but will never become a manager. The second man understands that workmanship is essential, but he is just polishing stones. The third man is the true manager because he also understands that workmanship is essential, but "it must always be related to the needs of the whole."

Drucker always admired people like the third stone cutter, and his own cathedral was the systematic study of organizations and their managers. His fascination with organizations appeared in his earliest book, published on the eve of World War II, and it continued unabated for more than six decades.

From Vienna to America

Peter F. Drucker was born in Vienna, Austria on November 19, 1909 to an upper-middle class assimilated Jewish family. Drucker's father was a well-educated senior civil servant at the Austrian Ministry of Economics. His grandmother had studied piano with Clara Schumann and performed for Johannes Brahms. Other family members knew the psychologist Alfred Adler, and Drucker's parents were friends with Sigmund Freud.

Although revolutionary developments in philosophy, psychology, art, and architecture were occurring in Vienna, Peter Drucker thought the city was hopelessly mired in the past. According to his charming autobiography, *Adventures of a Bystander* (1978), from the age of 14 he could not wait to leave his native city.

After graduation from the local *gymnasium*, the equivalent of an American high school, Drucker moved to Germany in the fall of 1927 to be a trainee clerk in a Hamburg export firm. "Those fifteen or sixteen months in Hamburg . . . were my real education," Drucker reminisced. "I certainly learned a great deal more reading in the public library than I had learned twelve years at school, or was going to learn in several university years." In that same year, he published his first article in a German economic quarterly on the Panama Canal's role in world trade.

Fifteen months later, he moved to Frankfurt as a securities analyst for a merchant bank. For the first time in his life, Drucker became interested in academic studies and received his Ph.D. in international and public law in 1931 at the age of 22.

By now, Drucker was working as a financial reporter for Frankfurt's largest newspaper. In two years, he rose to be senior editor of foreign and economic news. When the Nazis came to power, Drucker moved to England as the executive secretary of a small merchant bank. In three years he became a partner, but Drucker found banking unchallenging and left the field.

In 1937, Drucker proposed to Doris Schmitz. They were married for more than 60 years and raised four children. He affectionately described Doris as his first and best consultant. He frequently joked that he had made two great decisions in his life: not to attend college on a full-time basis and his refusal to accept Doris's first snub when he proposed to her.

Drucker became a freelance correspondent for several British newspapers. He moved to the United States and traveled around the country to interview such luminaries as Henry Wallace, John L. Lewis, Henry Luce, and Harry Hopkins. He also lectured, sometimes with humorous results.

When he appeared in New York City before the Colonial Dames, the woman greeting him said, "I'm the club secretary and the only member under seventy-five. We'll put all the members who can hear into the first two rows. But you better speak up; most of them can't hear too well. Don't bother about the others. They don't hear at all." After his lecture ended, a woman walked up to the front of the room and told him, "I am sorry I didn't hear well enough to get your talk, but don't you think that the poor will soon demand their place in the sun?"

When the Nazis took over Austria, his parents joined him in the United States. Drucker then published two books that made him well known on both sides of the Atlantic. In 1939, *The End of Economic Man* appeared. Drucker wrote that this study "attempted to analyze the roots of Nazism and of the decay of Europe's liberal and humanist traditions." Winston Churchill was so taken with the book that he recommended it to his field officers during World War II.

In 1942, the year Drucker became an American citizen, he published his second book, *The Future of Industrial Man*, which continued his political examination of the West's political and moral crisis and the role of organizations in the twentieth century. By this time he was teaching at Bennington College in Vermont.

The Future of Industrial Man stimulated his interest in the management of institutions, which led to an invitation from General Motors to analyze its management and corporate structure. His study of the automobile company led to the *Concept of the Corporation*, which was published in 1946. This book

Drucker's Early Ideas about the Economy and Society

- Neither totalitarianism nor liberal democracy has provided people with stability and dignity.
- The free enterprise system is superior to other economic systems, but it has failed to reconcile economic performance with social responsibility.
- The large corporation has become the dominant institution of modern society, and corporate managers have become the new elite.
- Corporate managers can only justify their legitimacy by promoting prosperity, trust, and healthy human relationships both inside and outside their organizations.
- The corporation is not just an economic institution. It has important social responsibilities to society.
- The biggest challenge for management is to narrow the gap between society's moral values and the amoral realities of economic activities.

made him famous, and after four decades it was still selling 20,000 copies a year!

New York City and Southern California

After the publication of the *Concept of the Corporation*, Drucker began consulting with hundreds of corporations and writing books about the theory and practice of management. In Drucker's books, the words "may" or "might" scarcely appear. As a writer, Drucker always has been supremely sure of himself. There is no arrogance in any of his books, only an author brimming with assurance, knowledge, and poise.

While Drucker was consulting and pouring forth a steady stream of books, he taught at Sarah Lawrence College, New York University, and, up until his death, Claremont College outside of Los Angeles. Besides management, he offered courses on economics, international relations, history and literature, Japanese art (his favorite hobby), and statistics. Drucker was awarded the Presidential Medal of Freedom by President George W. Bush on July 9, 2002.

He also served as a regular columnist for *The Wall Street Journal* from 1975 to 1995, contributed 31 articles to the *Harvard Business Review*, and wrote for *The Atlantic Monthly* and *The Economist*. As he was fond of saying, "I know absolutely nothing technical. My product is organized thinking."

Drucker is difficult to summarize because he was so prolific and wide-ranging in his interests. One approach to Drucker's thought is to examine two classics published 31 years apart—*The Practice of Management* (1954) and *Innovation and Entrepreneurship: Practice and Principles* (1985)—and then review his political and social thought. For those who would like a thorough analysis of Drucker's writings and a complete bibliography, I recommend John E. Flaherty's *Peter Drucker: Shaping the Managerial Mind* (1999). The best anthology of Drucker's writings on management is Peter F. Drucker, *The Essential Drucker: The Best of Sixty Years of Peter Drucker's Essential Writings on Management* (2001).

There is no arrogance in any of his books, only an author brimming with assurance, knowledge, and poise.

Peter Drucker receives the Presidential Medal of Freedom.

The Practice of Management (1954)

After the publication of the *Concept of the Corporation*, Drucker began exploring managerial theory and practice. As he surveyed the corporate landscape in the early 1950s, Drucker was saddened by the anti-intellectualism and resistance to theorizing that characterized the study of management. Schools of business educated callow youths with absolutely no business experience by focusing on techniques rather than knowledge and a broad humanistic education. He also was disappointed by many of the managers he observed.

These men—and they were all males in the early 1950s—seemed myopic because they put a premium on functionality rather than generalized knowledge. Drucker was puzzled by their penchant for secrecy and their reluctance to be interviewed, which he took to be a sure sign of insecurity and lack of vision.

The result of Drucker's wide-ranging reading and consultations between 1946 and 1954 was *The Practice of Management*. In the words of Flaherty, "it was the first attempt to codify managerial principles, prescribe basic skills for managerial effectiveness, and establish a foundation for the inchoate discipline of management." This book established the study of management as a serious academic and intellectual discipline. Evidently, it is still being read because several months ago I bought a 1968 London edition in a Maryland used book store for $2.00.

In his preface, Drucker clearly described the challenge that faced any student of management.

"We have available today the knowledge and experience needed for the successful practice of management. But there is probably no field of human endeavour where the always tremendous gap between knowledge and performance of the leaders and the knowledge and performance of the average is wider or more intractable."

Drucker made another point that undoubtedly surprised his readers. He argued that leadership could not "be taught or learned." But while management could not create leaders, it could create "the conditions under which potential leadership qualities become effective."

Drucker argued that ancient Greek and Israeli thinkers understood "all that has ever been known about leadership. The scores of books, papers, and speeches on leadership in the business enterprise that come out every year have little to say on the subject that was not already old when the Prophets spoke and Aeschylus wrote." Yet 3,000 years of inspired writing had not helped people to become better leaders.

> *Drucker argued that ancient Greek and Israeli thinkers understood "all that has ever been known about leadership."*

This is a theme that runs throughout Drucker's writings—to demystify the elements of effective management and leadership. It did not involve the possession of charisma or special gifts, and it

Drucker believed that leadership could not be taught or learned but through effective management could create the conditions for leadership to become obvious and effective.

did not justify the exorbitantly high salaries that Chief Executive Officers received. Being a good manager or leader required no genius, only thoughtful application.

In an article published many years later in the *Harvard Business Review*, Drucker listed eight principles that characterized successful managers and executives, none of which were related to a specific personality type:

- They asked, "What needs to be done?"
- They asked, "What is right for the enterprise?"
- They developed action plans.
- They took responsibility for their decisions.
- They communicated effectively.
- They focused on opportunities, not problems.
- They ran productive meetings.
- They always thought of "we" rather than "I."

Effective leadership was not the product of a magnetic personality or the ability to make friends and influence people. Instead, leadership was "the lifting of a man's vision to higher sights, the raising of a man's performance to a higher standard, the building of a man's personality beyond its normal limitations." To accomplish this goal, Drucker recommended "strict principles of conduct and responsibility, high standards of performance, and respect for the individual and his work."

> *Effective leadership was not the product of a magnetic personality... it was "the lifting of a man's vision to higher sights...beyond its normal limitations.*

According to Drucker, good management involved a holistic mind-set and the ability to recognize a corporate purpose. Effective managers needed to focus on ends rather than instrumental means. Drucker feared that if technicians rather than managers ran companies, customer needs and human relations would be ignored along with the outside world.

Drucker thought that the essence of effective management was the cultivation of the big rather than the little picture. He compared being a good manager to leading a symphony orchestra. By themselves, the orchestra's instrumental players could not produce beautiful music. They needed someone who shouldered the "task of creating a genuine whole." Drucker admired people like the legendary Alfred Sloan of General Motors because he had a compelling corporate vision that he used to help his company operate effectively.

Drucker compared being a good manager to leading a symphony orchestra—creating a "genuine whole."

In *The Practice of Management*, Drucker introduced one of his most influential ideas: management by objectives. According to him, management erred by looking for the Holy Grail of objectives that would lead to more profits. "The search for the one objective is essentially a search for a magic formula that will make judgement unnecessary. But the attempt to replace judgement by formula is always irrational."

Instead, Drucker advocated creating objectives in every area where "performance and results directly and vitally affect the survival and prosperity of the business." Objectives should accomplish five basic goals:

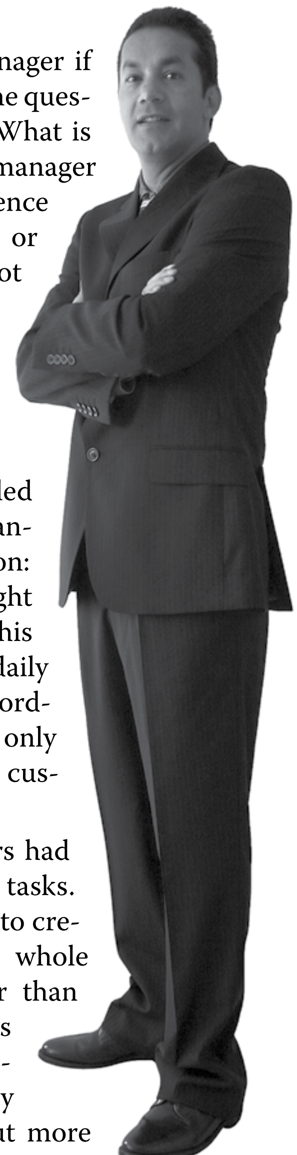
- Organize and explain the whole range of business activities in a small number of general statements
- Test these statements through actual experience
- Predict behavior
- Appraise the soundness of decisions while they are being tested
- Enable practitioners to analyze their own experience and thus improve their performance.

There were eight key areas where objectives of performance should be set: market standing, innovation, productivity, physical and financial resources, profitability, manager performance, worker performance and attitude, and public responsibility. Drucker refused to focus on profit to the exclusion of other areas. He believed that, if the corporation were viewed as a system rather than as many separate functions, there was only one kind of decision that should be made—a managerial decision.

Drucker's goal was to discredit the concept of management as a functional technique.

Drucker's goal was to discredit the concept of management as a functional technique. In his view, management by objectives would help produce professional managers instead of administrative technocrats. Drucker was very clear about who should not be in management.

A person should not be a manager if he or she was more interested in the question "Who is right?" instead of "What is right?" A person should not be a manager if he or she considered intelligence more important than character or integrity. Also, a person should not be a manager if he or she feared strong subordinates. Managers who lacked these qualities destroyed people, "the most valuable resource of the enterprise."



Drucker believed that firms failed primarily because they could not answer a seemingly simple question: What is the business? He thought that successful managers made this question a key element in their daily decision-making processes. According to Drucker, there is basically only one goal for businesses: to create customers.

To create customers, managers had two essential tasks. The first was to create a "true whole that is larger than the sum of its parts, a productive entity that turns out more than the sum of the resources put into it," like a symphony orchestra. The second essential task was to "harmonize in every decision and action the requirements of immediate and long-range future." This was always a major theme for Drucker: reconciling the past with the needs of the present, a concept he learned from reading the eighteenth-century English thinker, Edmund Burke.

Companies must give their managers a "vision and a meaningful contribution to their community and society."

Companies had to recruit educated and dedicated individuals, but to retain them, high salaries were not enough. "The enterprise must be able to give such men a vision and a meaningful contribution to their community and society."

This was another major theme for Drucker: business responsibility must embrace the public good. He wanted managers to restrain their self-interest and authority whenever

Drucker's Early Ideas about Business Management

- A business organization is a human institution and a means to an end, not an end in itself.
- The major purpose of a business is to create customers. Customers determine the business's mission.
- Performance and the ability to learn, not charisma or special gifts, determine the effectiveness of managers.
- Management is best learned by doing.
- Successful managers have similar characteristics: the ability to think holistically; good character and a sense of integrity; high standards of performance; and respect for others and their work.
- Management by objectives helps both managers and their subordinates enhance performance and results.
- Effective managers and leaders place their work within the broader context of the public good. Organizations must create meaning for their employees. People do not live by self-interest alone.

it infringed "upon the common weal and upon the freedom of the individual." If not, neither managers nor their firms would have any legitimacy.

The Practice of Management created a new discipline: the systematic study of management. Almost all contemporary management thinkers stand on the shoulders of this book. As one business writer admitted, "the new gurus aren't rewriting Drucker . . . . More often than not, they're updating him by adding new ideas and tools to what Drucker has called 'the practice of management.'"

> *Drucker denied that innovation and entrepreneurship involved special gifts, talents, inspirations, or flashes of genius.*

Innovation and Entrepreneurship: Practice and Principles (1985)

At the age of 76, a still-vigorous Peter F. Drucker published one of his most influential books, *Innovation and Entrepreneurship: Practice and Principles.* If I had to recommend one book of Drucker's to read, it would be this one because of its insightful blend of theory, practice, and case studies. It also is a pleasure to read.

Once again, Drucker began his book with a demystifying pronouncement. He considered the emergence of a "truly entrepreneurial economy in the United States during the last ten to fifteen years" the "most significant and hopeful event to have occurred in recent economic and social history." But Drucker denied that innovation and entrepreneurship involved special gifts, talents, inspirations, or flashes of genius.

Instead, "innovation is the specific tool of entrepreneurs, the means by which they exploit change as an opportunity for a different business or a different service. It is capable of being presented as a discipline, capable of being learned, capable of being practiced." Citing the eighteenth-century French economist, Jean-Baptiste Say, and his fellow Austrian, Joseph Schumpeter, Drucker argued that entrepreneurship rested on the premise that change was normal and healthy. The task of the entrepreneur, in Schumpeter's famous words, was "creative destruction."

Drucker identified seven possible sources for innovative opportunities. The first four came from within the company or the industry while the other three came from the outside:

- The unexpected: successes, failures, and outside events
- The incongruity: the difference between what is and what ought to be
- Process need
- Unexpected changes in the structure of the industry or market
- Demographic changes
- Changes in perceptions, moods, and meanings
- New knowledge.

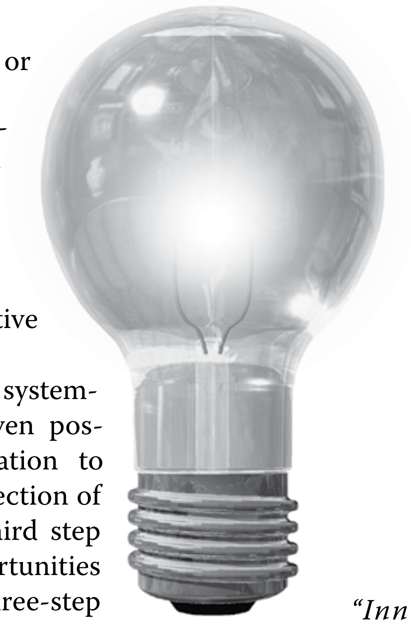
Drucker provided many examples of innovative companies that had taken advantage of new opportunities. Kimberly-Clark introduced disposable diapers. Pepsi-Cola created the Pepsi generation. Club Med introduced packaged vacations for the affluent middle class.

After the decline of many leading national magazines, such as *Life*, publishers created specialized magazines to reflect the country's ethnic and regional diversity and a new-found interest in specific topics, such as jogging or regional living. The Brunswick Corporation made bowling a popular form of family entertainment. And in the late 1950s, large urban banks introduced new credit plans for buying homes and cars for the growing middle class.

> *Drucker recognized that companies resisted innovation because it meant doing things differently.*

Drucker recommended that companies go through a four-step process to foster innovation. The first step is to prepare for innovation. This involved four basic steps:

- **Step 1:** Evaluate the lifecycle of existing services and products. Which ones are thriving and which ones have peaked or are declining?
- **Step 2:** Establish a systematic process of abandonment. This meant getting rid of products and services that were no longer productive.
- **Step 3:** Calculate the revenue gap that would result from the abandonment of specific products or services.
- **Step 4:** Set up a separate organizational structure to design, develop, and implement an innovative service or product with its own evaluative instruments.



"Innovation is a specific tool for entrepreneurs," one they should exercise regularly.

The second step is to systematically examine the seven possible sources of innovation to determine the future direction of the organization. The third step is to analyze the opportunities identified through a three-step process:

- **Step 1:** Conduct an analysis to determine the impact of the seven sources of innovation on the organization's processes, services, and products
- **Step 2:** Conduct a perceptual analysis of potentially new services and products, and how will they be perceived by the customer
- **Step 3:** Use customer surveys, focus groups, and other techniques to corroborate the analysis.

The fourth step is to exploit the new opportunities that had been identified, which involved a four-step process:

- **Step 1:** Conduct small-scale pilot tests of the new product or services
- **Step 2:** Commercialize the product or service
- **Step 3:** Provide adequate resources to bring it to market
- **Step 4:** Evaluate the results.

Drucker was confident that this procedure would result in the constant development of new products and services. He also thought that the best innovations were customer-driven and satisfied a simple and focused need, such as the need of mothers to use disposable diapers.

Drucker recognized that companies resisted innovation because it meant doing things differently.

He discouraged companies from asking, "How can we overcome the resistance to innovation in the existing organization?" Instead, the right question was "How can we make the organization receptive to innovation?" If innovation was defined as going against the grain, no company would embrace it. But if innovation were considered part of the day-to-day operations of the company, then it would succeed.

Drucker wanted companies to systematically abandon whatever was outworn, obsolete, and no longer productive. Every three years, companies should put all of its products, services, and internal processes on trial. Companies were like living organisms: they needed to eliminate their waste products to avoid poisoning themselves.

Drucker recommended specific techniques to foster entrepreneurial practices. The managerial vision should focus on opportunities. Companies should hold periodic two-day meetings for managers and executives that addressed three questions:

- What did we do that became successful?
- How did we find this opportunity?
- What have we learned and what entrepreneurial and innovative plans do we have now?

Every three years, companies should put all of its products, services, and internal processes on trial... they need to eliminate their waste products to avoid poisoning themselves.

Finally, Drucker advised companies to hold three long meetings a year with top management and junior staff in all major divisions. As top executives listened, junior employees would identify new opportunities and afterwards submit working papers to meeting participants about implementing their ideas. Even if few changes actually resulted from these meetings, Drucker thought they would help instill an entrepreneurial vision throughout the company.

Drucker wanted to encourage "habits of flexibility, of continuous learning, and of acceptance of change as normal and as opportunity—for institutions as well as for individuals." Here he thought that businesses could learn from the nonprofit sector in this arena. Instead of recommending that nonprofit organizations be run more like businesses, Drucker gave the opposite advice. Ultimately, Drucker wanted to create an entrepreneurial society where individuals and institutions were always learning and changing in response to new opportunities.

Political and Social Thought

While Drucker is best known for his studies of management, throughout his career he always wrote about government and society. I will review his

Drucker on Innovation and Entrepreneurship

- Innovation and entrepreneurship are keys to organizational longevity and success, and they are critically important because change is normal and healthy.
- Innovation and entrepreneurship should focus on opportunities, not risks or problems.
- To foster innovation, companies must understand that their products and services have short lives.
- To encourage managers to innovate, companies should (1) make their own products and services obsolete; and (2) develop a systematic process for creating new products and services based on the careful analysis of trends and opportunities.

thinking in four key areas: (1) the growth of the knowledge society, (2) the impact of demographic change on society, (3) the rise of the nonprofit sector, and (4) the continuing failure of government. For an anthology of Drucker's writings on society, see Peter F. Drucker, ed., *A Functioning Society: Selections from Sixty-Five Years of Writing on Community, Society, and Polity* (2003).

Growth of the Knowledge Society

According to Drucker, the most important contribution of management over the last century has been the fifty-fold increase in the productivity of workers in the manufacturing sector. In this century, the most important contribution of management will be to "increase the productivity of knowledge work and the knowledge worker." Equipment was once the greatest asset of a company. In the future, it will be the productivity of knowledge workers.

Knowledge workers "do not identify themselves as workers but as professionals. Many of them spend a great deal of time doing largely unskilled work, for example, straightening out patients' beds, answering the telephone, or filing. However, what identifies them in their own and in the public's mind is the part of their job that involves putting formal knowledge to work."

In this century, the most important contribution of management will be to "increase the productivity of knowledge work and the knowledge worker."

Knowledge workers, who now make up about one-third of the workforce in developed countries, have two main needs: formal education that qualifies them for certain positions and continuous education to keep their knowledge up-to-date. In the past, the concept of knowledge workers was applied to people with considerable theoretical knowledge and learning, such as physicians or engineers.

But today, this concept should be extended to include computer technicians, software designers, technicians in clinical laboratories, paralegals, and other professionals. Although many of the fields defined as knowledge work involved manual labor, they were all based on a "substantial amount of theoretical knowledge."

Drucker argued that the next society will be borderless, "because knowledge travels even more effortlessly than money." It would be based on upward mobility, which will be available to everyone through formal education. And

Drucker on Government and Society

- In developed countries, the growth of knowledge workers accounts for the remarkable increase in productivity over the last century.
- Falling birthrates and an increasing number of older people will change the economies and societies of developed countries in the 21st century.
- The rise of the nonprofit sector is one of the most positive developments in our society over the past fifty years because it provides essential social services and gives its participants a sense of fulfillment.
- The modern state cannot provide its citizens with a sense of community. That will have to come from organizations, not government agencies.
- Governments are inherently self-aggrandizing, bureaucratic, and incapable of innovating. Governments should privatize most of their traditional functions and focus on setting policy and standards.

it would have a high potential for individual failure as well as success because acquiring knowledge—the new means of production—would not guarantee upwards mobility.

Drucker was convinced that community colleges were responsible for the huge productivity of American society and the country's ability to "create, almost overnight, new and different industries." This was the wave of the future, for the only advantage developed countries possessed was to prepare, educate, and train people for knowledge work.

Impact of Demographic Change

According to an article written by Drucker in a 2001 issue of *The Economist*, "the dominant factor in the next society will be something to which most people are only just beginning to pay attention: the rapid growth in the older generation and the rapid shrinking of the younger generation." Drucker thought this demographic trend had positive consequences, but he was concerned about its overall impact on the economy and society.

On the positive side, Drucker believed that in the future, many adults over the age of 50 will choose not to work in traditional 9-to-5 jobs. Instead, they will participate in the labor force in nontraditional ways—as consultants, part-time workers, and as workers on special assignment. Others might devote a significant amount of their time to the nonprofit sector. These new ways of working will be a managerial challenge as organizations scramble to find ways to attract and retain growing numbers of older and educated people.

Second careers and the second half of one's life increasingly will become common words as people develop 50-year work careers. In the past, organizations typically outlived their employees, but now the life expectancies of adults will dwarf the lives of most organizations.

But the real upheaval will be caused by the shrinking of the birthrate below the replacement rate of 2.2 live births per woman of reproductive age. This will lead to several important changes. First, it will make immigration a contentious issue in developed countries because only migration will help address the problem of shrinking birthrates. Second, it will mean a major change in the markets of developed countries. After World War II, the market became focused on young people. Now it will increasingly fall upon middle-aged and older people because of their growing numbers and purchasing power.

Second careers and the second half of one's life increasingly will become common words as people develop 50-year work careers.

The rapid growth of the older generation may lead to new and varied career choices for those professionals who traditionally would be retiring.

In Germany, Italy, France, Spain, Portugal, the Netherlands, Sweden, Japan, the United States, and other developed countries, demographic patterns will strain the resources of government and society. Today in Germany 20 percent of the population is over 65. By 2030, that percentage will rise to 50 as the population declines from 82 to about 70 million people. During that same period, the number of working people will fall from 40 to 30 million. To keep the number of working people steady, by the year 2020 Germany would have to attract one million immigrants a year. Clearly, this is not likely to occur.

Life expectancy has been slowly rising for the past three centuries, but the declining birthrate is an unprecedented demographic event. Even in the United States, where the population is increasing due to immigration, the proportion of older people to the general population will rise steeply in the next 30 years.

Drucker wondered how developed countries will provide generous medical and retirement benefits to older people because the number of employed will shrink. Drucker also feared that the fight over retirement and medical benefits might split society into warring political camps and break the intergenerational compact between the young and old. He concluded that "demographics will not only be the most important factor in the next society, it will also be the least predictable and least controllable one."

Rise of the Nonprofit Sector

In the last two decades of his life, Drucker became very interested in the growing nonprofit sector of American society. In 1990, he helped found the Peter F. Drucker Foundation for Nonprofit Management, which in 2003 became the Leader to Leader Institute.

Drucker admired America's best nonprofit organizations and believed they played a crucially important role in addressing local needs. According to him, the "21st century will be the century of the social sector organization. The more economy, money, and information become global, the more community will matter. Only the social sector nonprofit performs in the community, exploits its opportunities, mobilizes its local resources, solves its problems. The leadership, competence, and management of the social sector nonprofit organization will thus largely determine the values, the vision, the cohesion, and the performance of the 21st century society."

Drucker believed that the modern state was so large that political citizenship was no longer functional. Consequently, autonomous community organizations were needed to help government perform more effectively and offer citizens satisfying outlets for their idealism. Drucker cited church-run inner city schools, pastoral churches, Girl Scouts, Red Cross, Alcoholics Anonymous, the Salvation Army, the American Heart Association, and the American Mental Health Association as examples of nonprofit organizations that produced impressive results.

> *Drucker believed that the modern state was so large that political citizenship was no longer functional.*

Drucker thought that the rise of the nonprofit sector served as a clear warning to the private sector. When he asked business executives why they served as nonprofit volunteers in churches, scout troops, or in the local symphony orchestra, he heard the same answer. "In my paying job there isn't much challenge, not enough opportunity for achievement, not enough responsibility: and there is no mission, there is only expediency."

Drucker was heartened by the fact that if volunteers were counted, the nonprofit sector would be America's largest employer with more than 80 million people volunteering nearly five hours a week—the equivalent of 10 million full-time jobs. He was convinced that nonprofit organizations were pioneers in the motivation and productivity of knowledge workers. They were developing the policies and practices that the business sector would need to follow in the future.

The Future of Government

Throughout his life, Drucker had a negative view of the state. Drucker admired his father's Austrian civil service, but in general he believed that governments are inefficient, unproductive, and interested only in expanding their size and power.

Drucker wanted government to systematically abandon what he considered "outworn social policies and obsolete public-service institutions." An effective government should stop "doing" and instead concentrate on setting policies, making decisions, establishing standards, and providing its citizens with a vision.

Drucker believed that today's democratic states are pork-barrel states because elected representatives "fleece their constituents to enrich special-interest groups." Throughout Drucker's writings, I have found no examples of the many successful government-sponsored programs from countries at the top of the United Nations Human Development Index, such as Denmark, Canada, Switzerland, Sweden, or Finland.

> *Drucker did not believe that governments are capable of much innovation.*

Drucker did not believe that governments are capable of much innovation. Public service institutions are dependent on budgets rather than results. They have to satisfy too many people. Most significantly, they exist to promote some good and see their missions in terms of moral absolutes. Consequently, they are incapable of doing a cost/benefit analysis to determine their effectiveness. "Most innovations in public-service institutions are imposed on them either by outsiders or by catastrophe," Drucker claimed.

Drucker's solution was to privatize many traditional government functions. He claimed to be in favor of effective rather than strong government, but throughout his writings, government is always a problem, not a solution.

Shaping the Managerial Mind

For Drucker, the fundamental task of management is always the same, whether the organization is a business, nonprofit, or government agency: "to make people capable of joint performance through common goals, common values, the right structure, and the training and development they need to perform and to respond to change." Ultimately, management is about human beings. Its goal is to magnify people's strengths and minimize their weaknesses.

Drucker believed that effective management was a liberal art. It was liberal because it dealt with the "fundamentals of knowledge, self-knowledge, wisdom, and leadership." It was an art because of its concern with practice and application.

Drucker wanted the leaders and managers of organizations to ask themselves five basic questions:

- What is our mission?
- Who is our customer?
- What does our customer value?
- What are our results?
- What is our plan?

Drucker thought that management had transformed the world's developed countries over the past two centuries. Managers have created a global economy and now rule the world. Most of them are only dimly aware of their power, and thus they are unprepared for the tremendous challenges that will confront them.

Drucker tried to make managers more reflective about their tasks and their role in modern society. To be effective, he believed that managers always needed to ask a series of fundamental questions that went to the heart of their responsibilities. "To whom is management accountable? And for what? On what does management base its power? What gives it legitimacy?"

These are questions well worth pondering for proposal professionals.

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Jayme A. Sokolow, Ph.D., is founder and president of The Development Source, Inc., a proposal services company located in Silver Spring, MD, that works with businesses, government agencies, and nonprofit organizations. He has been the president of two nonprofit organizations and has served on four nonprofit boards and a foundation board. He is also Assistant Managing Editor and Chair of the Editorial Advisory Board of *Proposal Management*. He can be reached at JSoko12481@aol.com.

Book Review

Before and After Page Design by John McWade; Peachpit Press; 2003; Retail Price: $24.99

by Ali Paskun

The APMP Accreditation Program requires that candidates should be able to understand best practice when creating document styles, format, and visuals. One book on the marketplace that talks about this best practice has been reviewed by Ali Paksun on behalf of the APMP.

I don't think visually…I'm a "word" person. That's why it is sometimes difficult for me to effectively relate to graphic artists and desktop publishers what I am looking for when producing a proposal. Thankfully such resources as this one are available.

[The book] goes a long way to help teach how to think visually to ensure your graphics, layout, and format are being used effectively.

The book is written by John McWade, Publisher and Creative Director of *Before & After Magazine*. According to their Website the magazine, "…has been sharing its practical approach to graphic design since 1990. Because our modern world has made designers of us all (ready or not), *Before & After is* dedicated to making graphic design understandable, useful and even fun for everyone."

Each chapter of the book is dedicated to a specific type of publication such as brochures, newsletters, or fliers. "Aha," you may be asking yourself, "what does this have to do with proposals?" My answer: "Quite a bit." McWade provides step-by-step directions for applying design elements that make your documentation more reader friendly as well as more appealing. When working on proposals, one often forgets that a visually effective document—one that incorporates basic design principles for font selection and graphic layout—makes for a more reader-friendly document.

Before & After Page Design is full of easy-to-understand and -use techniques, tips, and advice for a variety of the most common documents, including single-page and multi-page, color, and black and white documents. Tips and lessons cover subjects such as using subheads, choosing grids, applying text wraps, finding the right fonts, and incorporating photos.

As with other redesign books, McWade starts by showing how to design a particular type of publication, then goes on to demonstrate a "before" and "after" example. Most of these "makeover" examples of document designs offer detailed explanations why each of the "after" changes, ranging from format to fonts, was incorporated. These makeovers also include specific layout and font specifications the reader can use to recreate the look and feel of the document presented.

Often, especially in small companies, proposal professionals need to wear many hats. For those of us who are not experts on the use of the popular graphics packages available (e.g., Adobe Illustrator or In Design), this book does offer some foundation for getting started. For instance, the use of grids when developing a multiple-column layout may be a time-saving trick to a graphics novice. While the book does assume a certain level of familiarity with graphics design (a lot of the terms aren't defined), it still provides more than its fair share of helpful advice and tricks of the trade. It goes a long way to help teach how to think visually to ensure your graphics, layout, and format are being used effectively.

Fellows Award

The APMP Fellows Award recognizes individuals who have made substantial contributions to our profession and APMP. Fellows aid APMP as advisers and mentors, continuing their records of excellence and service.

2001 Recipients Presented May 25, 2001, Albuquerque, New Mexico

Nancy Cottle
Marianne Gouveia
Eric Gregory
Steve Myers
Patricia Nunn
Bill Painter
David Pugh
Tom Sant
Steve Shipley

2003 Recipients Presented May 24, 2003, New Orleans, Louisiana

Charlie Divine
Barry Fields
Dennis Green
Steve Jensen
Jayme Sokolow

2005 Recipients Presented June 8, 2005, Phoenix, Arizona

Mark Ciamarra
Dana Spears

2002 Recipients Presented May 9, 2002, Salt Lake City, Utah

Tom Amrhein
David Bol
Tom Boren
Mike Ianelli
Chuck Keller
Sherrill Necessary
Howard Nutt
Karen Shaw

2004 Recipients Presented June 2, 2004, Hollywood, Florida

Art Bass
Richard "Dick" Eassom
Michael Humm
Nancy Kessler

2006 Recipients Presented May 23, 2006, New Orleans, Louisiana

Tony Birch
Neil Cobb
John Elder
Robert Frey
Alan Goldberg
Jon Williams

2006 Conference and Awards

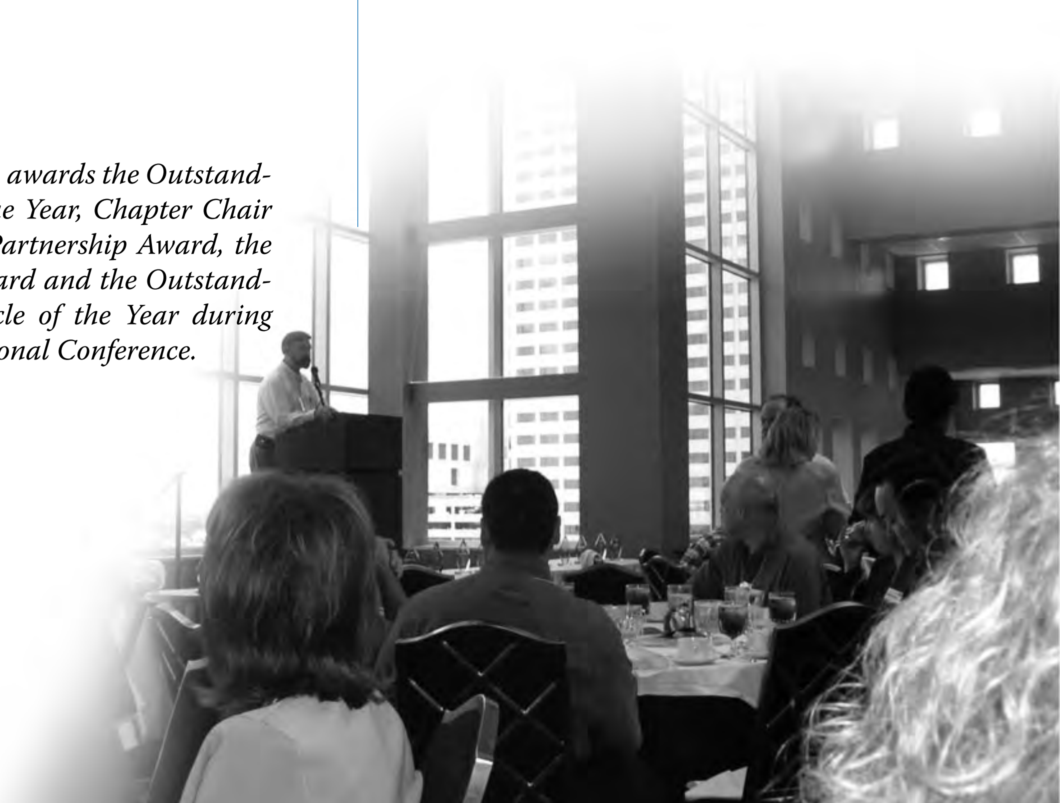
The 2006 National Conference in New Orleans was a huge success! Here is a list of the people and companies that were honored at the conference in addition to the Fellows induction. This list is courtesy of Perspective.

The SOCAL chapter received the Everest Award as the Outstanding Chapter of the Year for 2005. Keith Propst was named the Chapter Chair of the Year for his two years' service as Chair of the Georgia Chattahoochee Chapter. 24 Hour Company was recognized with the Partnership Award, John Elder received the Compatriot's Award for his leadership as the Editor of the APMP Professional Journal, and Chuck Keller received the award for the Outstanding Journal Article for 2005.

In addition to the individual and chapter awards, APMP acknowledged its 2006 corporate sponsors. Our corporate sponsors include: The 24 Hour Company, Atos Origin, BAE Systems, The Boeing Company, CACI, CSC, EDS, Lockheed Martin, Northrop Grumman, Pragmatech Software, Proposal Software, QND, Shipley Associates, SM&A, Synchris Privia, Vodafone, and the Waverly Group.

We would like to acknowledge several companies that provided conference materials: BAE Systems for the portfolios, SM&A for the conference bags, Pragmatech Software for the document holders, QND for compiling the proceedings on CD-ROMs, and Shipley Associates for the pens.

In addition, a special thanks to Steve Jensen, Speaker Coordinator; Barry Fields, Registration; John Elder, Editor and Brochure Production Coordinator; Dave Contreras, Brochure Design and Layout; Chuck Keller and David Winton, Conference Co-chairs; and the APMP Board of Directors.



David Winton awards the Outstanding Chapter of the Year, Chapter Chair of the Year, the Partnership Award, the Compatriot's Award and the Outstanding Journal Article of the Year during lunch at the National Conference.

Authorized Training Organizations

The following organizations are approved by APMP to conduct training anywhere in the world to support the APMP Accreditation Program.

Shipley™ Associates

Shipley™ Limited

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Index of Articles

Note: Archive articles are posted in PDF format at the APMP Website, www.apmp.org.

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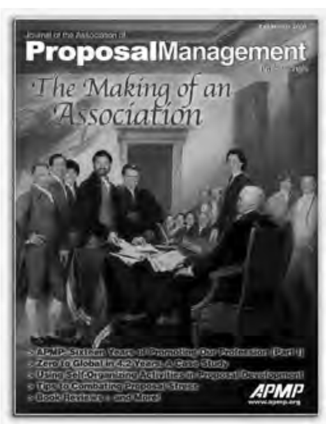

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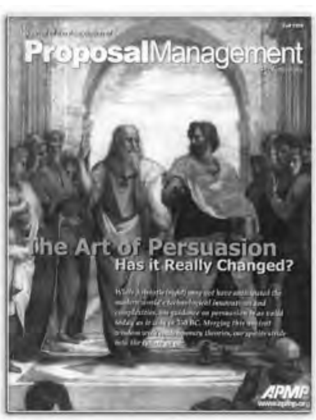

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