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Journal of the Association of ProposalManagement • APMP • Fall/Winter 2007

Cover Art by Colleen Jolly, 24 Hour Company.
Graphics and Layout by Debi Ratcliffe and 24 Hour Company.

CEO/COO Forum

by Paul Taylor and Dick Eassom, AF.APMP

I cannot believe that I am already approaching the end of my time as CEO of our Association. I am writing to you as I prepare to fly to Palm Springs for our final face-to-face Board Meeting of the year. I am grateful to my company, BT Group plc, and the employers of my fellow Directors for the way in which they support the organisation by allowing these individuals the time, resources, and funding to carry out their duties on behalf of the APMP membership. I am also indebted to the Directors themselves for their work in developing and growing the Association—record numbers at the Conference, membership at an all-time high, new chapters in the United States and worldwide, Accreditation, the Website, Body of Knowledge™, and more—the list of recent accomplishments is a testimony to what has been achieved. I can promise more to come over the next 12 months as we seek to further improve and enhance the services and facilities available to you through the APMP. Finally, thank you for your membership, feedback, participation, and contribution to the Association.

...the list of recent accomplishments are a testimony to what has been achieved.

It has been a privilege to serve you.

Welcome

by John Elder, AF.APMP

The 18th Annual APMP International Conference and Exhibits was a resounding success—not only in the record-setting number of attendees, but in the number of relevant and highly rated presentations, panel discussions, and workshops. In this issue of *The Journal*, we revisit some of the topics and speakers from the Conference.

At the Conference, APMP and GBC partnered to conduct a survey on incorporating company branding into proposals. The results are presented here by Kellie Glueck of the David James Group, and I think you will find the results interesting and, perhaps, a little surprising. Regarding another research project at the Conference, Robin Ritchey says, *"Survey said..."* and uses a Family Feud-based style to let *Journal* readers know the outcome of an effort to determine techniques to help those in our profession keep "reasonable" work hours.

A panel discussion evaluated highly by those who attended was presented by the Industry-Government Task Force and the Government Liaisons: Alan Goldberg (US Navy), and Dan Fulmer and Ed Martin (US Air Force). Director of Strategic Initiatives, Jessica Morgenstern, offers an abridged version of the group's report of their nine-month evaluation of the "touch points" between industry and government acquisition lifecycles. This effort was ambitious, involved a dedicated team, and provided an insightful look into the parallels between the two acquisition processes.

One of the most entertaining activities was a sketching competition sponsored by QND. Potential Picassos and Rembrandts were given crayons and paper, and told to draw whatever came to mind regarding bids and proposals. As you can see from this issue's *To Wit*, the results varied from the serious to the hilarious, but each one was creative and truly representative of what we deal with every day.

Two APMP initiatives that have done much to advance the organization are the Accreditation Program and the Body of Knowledge. In this issue, Holly Andrews and Charlie Divine provide updates on these two initiatives. Andrews explains why accreditation is important to advancing our profession, while Divine provides step-by-step directions of how to access and benefit from the best practices in the Body of Knowledge.

On a personal note, I would like to remember Eugene "Gene" Dawson, who passed away earlier this year. Gene co-founded Winning Proposals, Inc., a proposal consulting business located in the Washington, DC area. He and his business partner, Lou Robinson, were profiled in the Spring 2001 issue of *The Journal*. Gene supported the APMP and, more specifically, the National Area Chapter for many years. He was gregarious and had an infectious sense of humor. Gene was not only a colleague; he was a friend to all who knew him. He will be missed.

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Our mission is to advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.

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General Information

APMP's mission is to advance the arts, sciences, 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.

Membership

The people of APMP are some of the most resourceful professionals in the business world today. We invite you to join us and discover how we can help you pursue new horizons in proposal excellence. To access a New Member Registration Form, renew your membership, or find information on becoming a Corporate member of APMP, please visit the Website (www.apmp.org), and click on "Membership."

Membership in APMP is $125.00 (USD) per year, renewable on the anniversary date of joining the Association. If you do not wish to provide credit card or electronic check information online, please complete the membership application and indicate you are paying by check. Then contact MemberServices@apmp.org or call Barry Fields at (406) 788-9840 to make arrangements for payment.

APMP's Federal Tax ID Number is 87-0469987.

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Members of APMP can update their profile online by clicking "Membership" on the APMP Web page, and then clicking "Update Member Profile." Updating a profile requires the username and password you were provided when you become a member.

Any change in correspondence relating to non-member subscriptions should be sent to:

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Great Falls, MT 59404
Phone: (406) 788-9840
Fax: (406) 454-0090
Email: MemberServices@apmp.org

Subscription to *The Journal* for APMP members is included in the annual membership dues. For non-members, a subscription is $40 per year. Individual issues may be purchased for $20 each from the APMP office while supplies last.

Advertising Rates and Guidelines

The following rates are effective for 2008:

Rates per Issue:

Premium Placement Locations*
(Sold for both 2008 issues)

- Back Cover: $3,000.00 (4 Color)
- Inside Front Cover: $2,500.00 (4 Color)
- Inside Back Cover: $2,500.00 (4 Color).

All Other Placement Locations*

- Full Page: $2,200.00 (4 Color)
- Full Page: $2,000.00 (B&W)
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*15% discount for all contracts of three or more consecutive issues with payment in advance.

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- Ad commitment (50% minimum, deposit required)—due February 1st (for Spring) or August 1st (for Fall)
- Electronic copy—due March 1st (for Spring) or September 1st (for Fall)
- Final payment due to APMP—March 1st (for Spring) or September 1st (for Fall).

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For technical assistance, please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

Please visit the APMP Website at www.apmp.org for additional information, including viewable PDF files of advertisements and articles.

Invitation to Writers

Contribute to our next issue. Let us hear from you today. We are open to many and varied topics of interest to professionals in our field.

Send us a letter, submit an article, or propose your topic of interest. Submit a short (50-word) proposal for your article summarizing its principal thesis, issues, basis, and scope. You do not need to be an APMP member to contribute.

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

For more information or to plan your contribution, call or email us:

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Guidelines for Authors

The Journal of the Association of Proposal Management Professionals *(The Journal) publishes articles, research efforts, and case studies about business development and proposal management. It provides examples of practical application of industry-accepted best practices to enhance our readers' professional development. You are invited to submit articles for publication in The Journal. We are open to many and varied topics of interest to professionals in our field.*

The Journal is published bi-annually by APMP. *The Journal* is printed in the USA. Claims for missing copies must be made within three months of publication date. Missing copies will be supplied as reserve stock permits. Please visit the APMP Website at www.apmp.org for additional information about *The Journal*, including viewable PDF files of advertisements and articles.

If you would like to submit an article, begin by reading these Guidelines for Authors. They provide general guidance on manuscript preparation, scope of content, style, and methodology for submission and review. The following table provides *The Journal's* publication schedule to aid authors in determining submission milestones.

	Spring/Summer	*Fall/Winter*
Concept approval	August	February
Summary and outline due	October	April
Article first draft	December	June
Peer review	January	July
Article final due	February	August
Print	March	September
Distribute	April	October

Editorial Statement

The Journal 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

The Journal 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. It is a medium for promoting constructive, intelligent discussion and debate about business development acquisition and proposal management. Because the primary audience 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 email; Microsoft Word is the preferred electronic format
- 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 the Managing Editor or the Chair of the Editorial Advisory Board:

John Elder, Managing Editor	(703) 841-7809 jelder@caci.com
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General inquiries can be made to the APMP Executive Director at (949) 493-9398.	

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-level 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 parentheses [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 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 an email address and a telephone number where you can be reached during business hours.

Style

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. The authority for spelling/usage is Webster's Dictionary, and The Chicago Manual of Style is the authority for punctuation and format. All articles are reviewed and edited by members of *The Journal* staff.

Review

Submissions, if they conform to the above specifications, will be reviewed by the 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(s) with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Conflict of Interest

While staff and contributors to *The Journal* may benefit from the professional recognition they gain through this affiliation, they shall not use *The Journal* as a forum to give inappropriate or unfair advantage to themselves or others. Staff members and contributors are permitted to purchase advertising at standard, published rates. Any staff members or contributors who believe they have a potential conflict of interest must immediately notify the Managing Editor of *The Journal*, who will decide whether a potential or real conflict of interest exists. Based on the Managing Editor's decision, staff or contributors may be asked not to involve themselves on the subject of the conflict of interest.

Objectivity

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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GPS

Global Positioning Strategies for Capture and Proposal Professionals

19th Annual
APMP International
Conference & Exhibits

The Westin Mission Hills
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May 27 - May 30, 2008

APMP®

Association of Proposal Management Professionals

19th Annual APMP International Conference & Exhibits

We are pleased to announce the Conference theme, "*Global Positioning Strategies for Capture and Proposal Professionals*," to be held in Rancho Mirage, California, from May 27-May 30, 2008. Our theme includes two thrusts: the international or global nature of our organization, and the relevance of the capture phase of business development in the proposal profession.

RESERVATIONS

Call the Westin Mission Hills Resort (760) 328-5955 or Westin's Central Reservation Office at 1 (800) 937-8461.

One night's room rate will be applied to each individual reservation at the time of initial reservation call as a form of individual deposit. Your initial reservation rate will include the $20.00 Resort Fee. This fee has been waived for APMP and will automatically be deducted from your bill.

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Rancho Mirage, CA
92270

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Cut-off date for taking advantage of the conference rate is May 6, 2008. (Rates available 3 days before and 3 days after the actual conference dates **SUBJECT TO AVAILABILITY**).

You can also reserve your room online at apmp.org or go to http://www.starwoodmeeting.com/Book/apmp2008

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For GSA rate reservations only, please email: jeimy.sandoval@westin.com

Upon arrival at the hotel the Front Desk will ask to see the government/military ID cards for all guests registering with the GSA rate at check-in. Those who do not have an active duty/government employee ID card will be not be given the GSA rate. The group's ROH rate will be charged.

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Check-in time at the Resort is 3:00pm. The Resort will make reasonable efforts to accommodate early arrivals. Check-out time is 12:00pm. Group members staying in their rooms beyond the check-out time without Resort authorization will be charged for an additional room night.

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In the event that a guest who has reserved a room within your block checks out prior to the guest's reserved checkout date, an early departure fee of $75.00 will be charged to that guest's individual account. Guests wishing to avoid this fee must advise the hotel at or before check-in of any change in the scheduled length of stay.

DRIVING DIRECTIONS

From Palm Springs Regional Airport. Exit airport and turn left onto El Cielo. Turn left onto Ramon Road. Turn right onto Date Palm Drive. Turn left onto Dinah Shore Drive. The Resort will be on the right. Approximate trip time is 15 minutes.

For further details or for directions to Southern California attractions, Please call the Westin Concierge at (760) 770-2153.


APMP
Business
Development
INSTITUTE INTERNATIONAL

BD-KnowledgeBase™

APMP's Body of Knowledge

by Charlie Divine, PPF.APMP

What if you could?

- *Access key practices of the proposal and business development profession online*
- *Gain insight into how others in your profession are solving both the big and small problems you face every day*
- *Review articles and presentations that present key practices about a particular business development process step that you face*
- *Discover the skills and knowledge you need to improve the performance of you and your team*
- *Share new and innovative ideas with fellow practitioners from around the world using a Wiki.*

It is available now by simply accessing the BD-KnowledgeBase™.

Figure 1. The home page has announcements and general information about the BD-KnowledgeBase in the center section. Links to the elements of the BD-KnowledgeBase are shown in the left-hand bar.

APMP, in collaboration with the BD Institute, has created a body of knowledge for APMP members. The BD-KnowledgeBase identifies practices, process elements, and tools that are generally recognized as key practices and hallmarks of the business development discipline. It provides:

- A managed resource for the key practices within the business development profession
- A foundation of facts and competencies for certification
- A reference guide with practical applications for the BD-CMM model.

The BD-KnowledgeBase was introduced to members at the 2007 Annual Conference in Savannah, GA. This "jump-start" version was built from readily available sources, such as the *Journal of the Association of Proposal Management Professionals;* APMP *Perspective*; and US, UK, and regional conference presentations.

Information included in the KnowledgeBase met three criteria. The information must:

- Be considered useful to APMP members and other BD professionals
- Represent and support BD-CMM key practices
- Complement the APMP Certification Syllabus.

Where is the BD–KnowledgeBase located?

Use your browser to link to the URL www.bd-knowledgebase.org. A pop-up screen will ask for your user name and password. Respond with the following:

User Name: **BDguest** *(case sensitive)*
Password: **BDsite!** *(case sensitive and include the !)*

Currently the site uses the default user name and password shown above. Development is underway to support individual user names and passwords.

The Home Page is shown in Figure 1.

How do I find what I need?

The BD-KnowledgeBase offers three ways to find the information you need.

- Simple Search—Use a familiar Google-like search
- Metadata Filtering—Choose one of eight different categories of metadata and separate out the relevant information
- Browsing—Look through the entire collection using titles and abstracts as your guide.

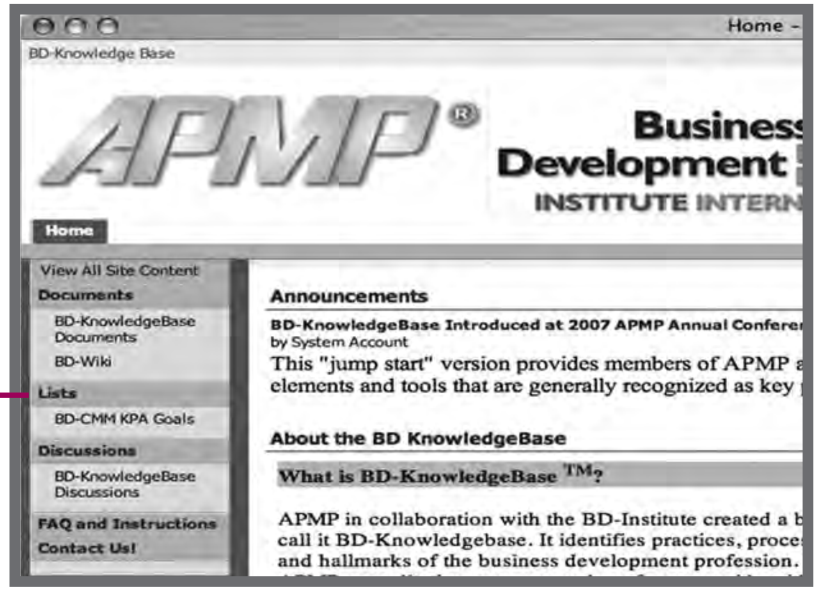
To begin your search, click on the link to BD-KnowledgeBase Documents in the left-hand bar on the Home Page; see Figure 2.

The BD-KnowledgeBase Document page is the beginning location for all three types of searches. The simple Google-like search is located at the top of the center section. The Metadata filtering search—View tab is on the right-hand side of the center section just above the document collection. The document collection is in the bottom half of the center section below the simple search criteria.

Figure 3 (see page 18) shows the location of the three search features.

Simple Search

Simply type in one or more terms you want to search for in the search boxes located on the BD-KnowledgeBase Documents page. Search terms are the word(s) or phrase(s) that best describe the information you want to find. Hit the "Enter" key or click on the "Search" button. Using simple search, you can search for artifacts that:



Select BD-KnowledgeBase to access search features.

Figure 2. BD-KnowledgeBase Documents in the left-hand bar provide links to searches and the collection of documents.

- Contain at least one of the words you type in
- Contains ALL the search terms you type in
- Contains the exact phrase you type in
- Do NOT contain any of the words you type in.

A ranked list of responsive artifacts will be displayed along with links to download. You can open and view each responsive document.

An example of the result of a search for "Red Team" is shown in Figures 4 and 5 (see page 18).

Metadata Filters

This is located under the "View" Tab on the right-hand side of the BD-KnowledgeBase Documents page. These views by choices allow you to view the document collection filtered by any one of nine categories of metadata associated with the business development discipline. Additional views by author and source are provided.

The nine categories of metadata are:

- Author
- Common Factor
- Competency
- Country
- Form
- Industry

Figure 3.
The BD-KnowledgeBase Document page provides three unique search features.

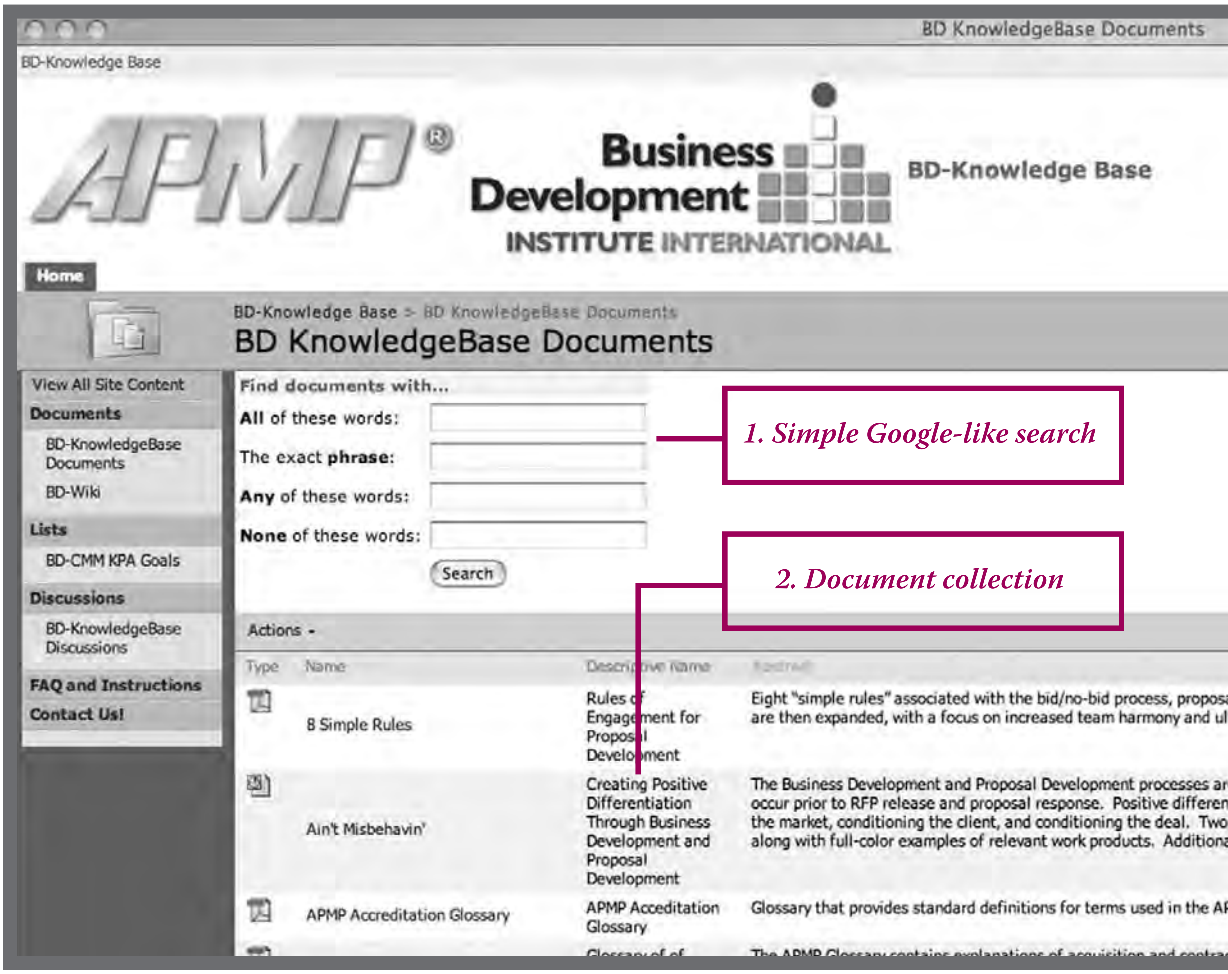
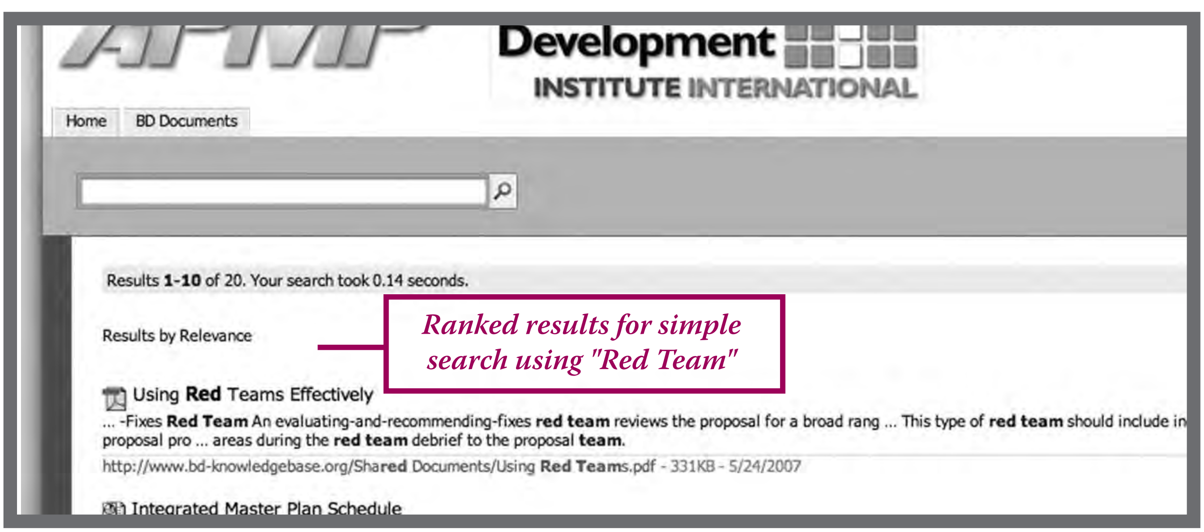
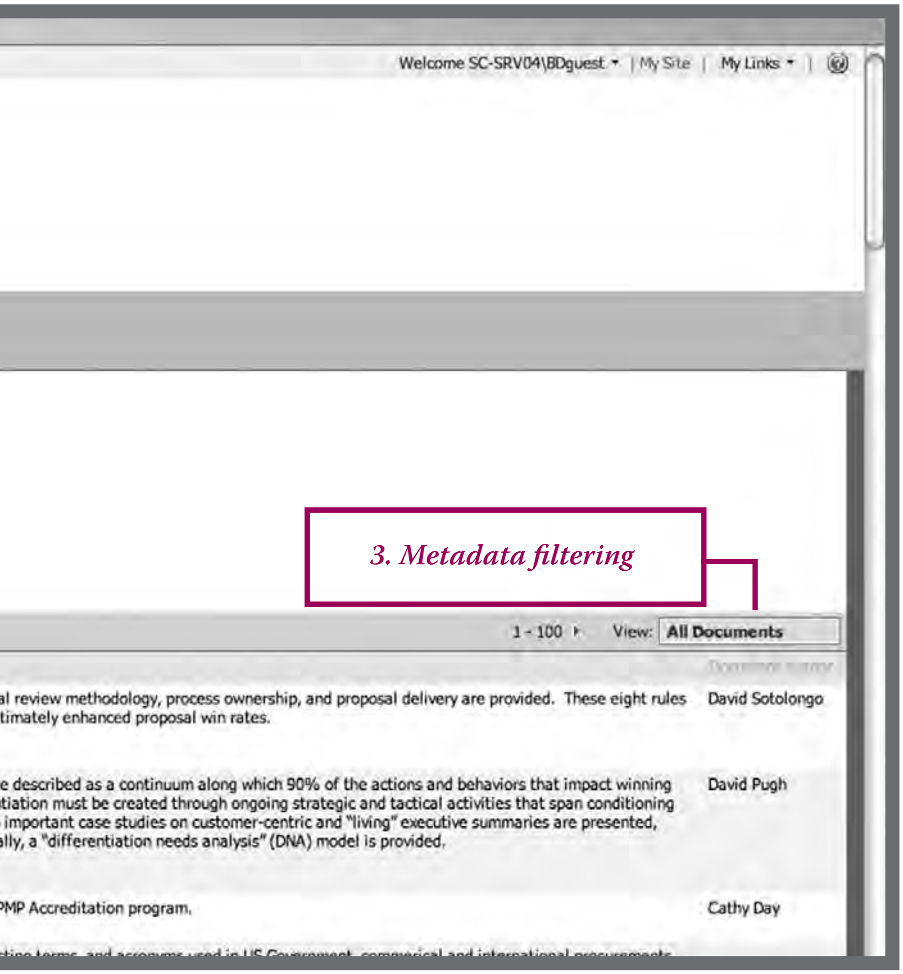


Figure 4. Simple searches for the term "Red Team."

Figure 5. Results presented for "Red Team" simple search.





- Key Process Category/Key Process Area (KPC/KPA)
- Market
- Process Phase.

Additional details about the metadata categories are presented in Figure 10 at the end of the article.

After choosing the view by category of metadata you wish to use, a new view will appear. Next, select the value of the metadata category of interest, and only documents that relate to that value within the category will appear.

For example, if you wish to find documents that apply to the "Capture Planning" proposal process phase, first select the "View by Process Phase" view, then select "Capture Planning" from the drop-down box associated with the "Process Phase" heading. Only documents that have been metataged to relate to the capture phase will appear.

An example of the metadata-filtering search described above is shown in Figures 6-9 (see pages 20 and 21).

Browse the Collection

In addition, you can simply browse the collection of artifacts on the BD-KnowledgeBase Documents page using the entire collection or the filtering technique described above.

Also: Additional Information on Metadata Categories on pages 21 and 22.

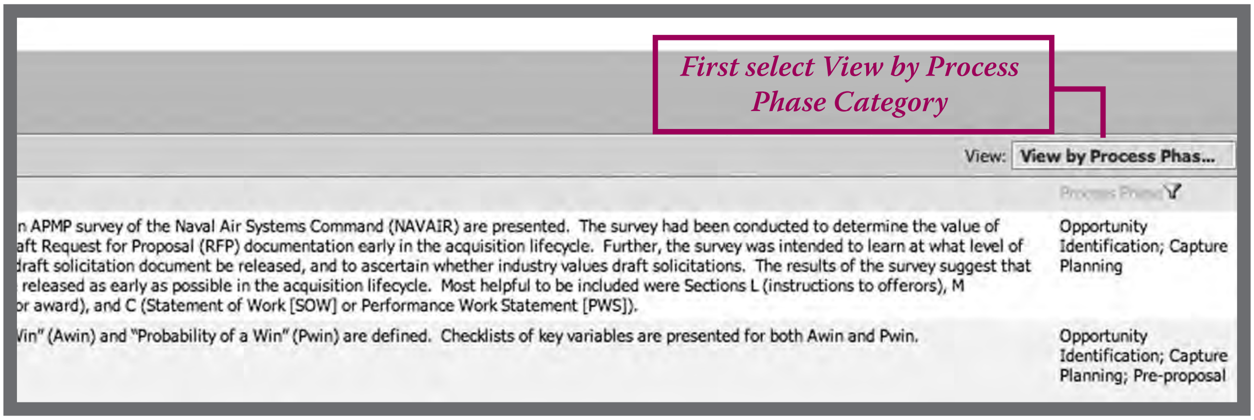


Figure 6. Select "View by Process Phase" category.

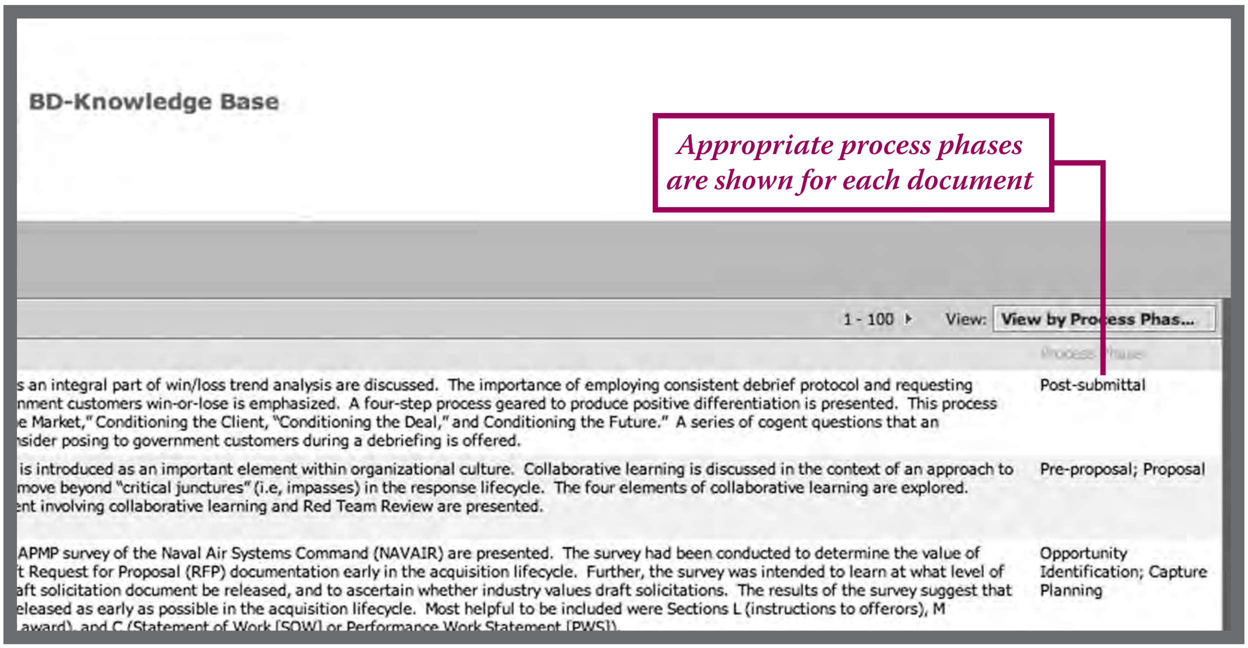


Figure 7. Result "View by Process Phase. Entire Document collection is now viewable with Process Phase metadata displayed.

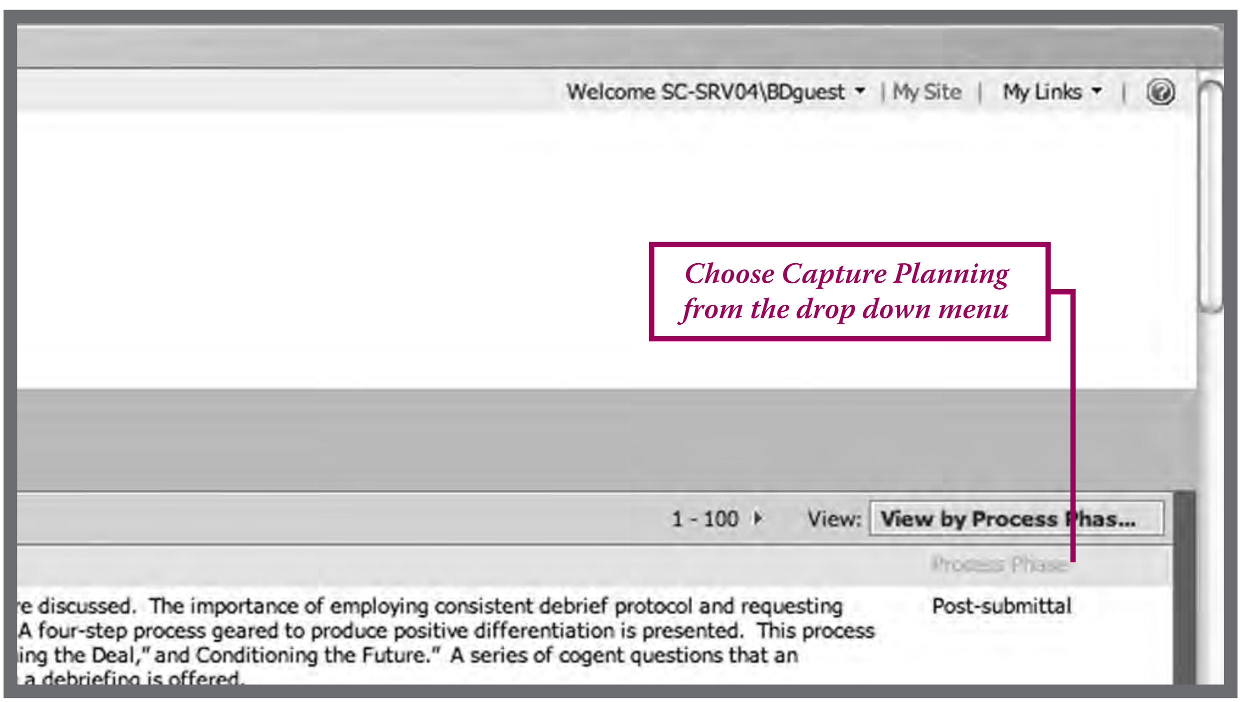


Figure 8. Using the drop down beneath Process Phase, choose Capture Planning.

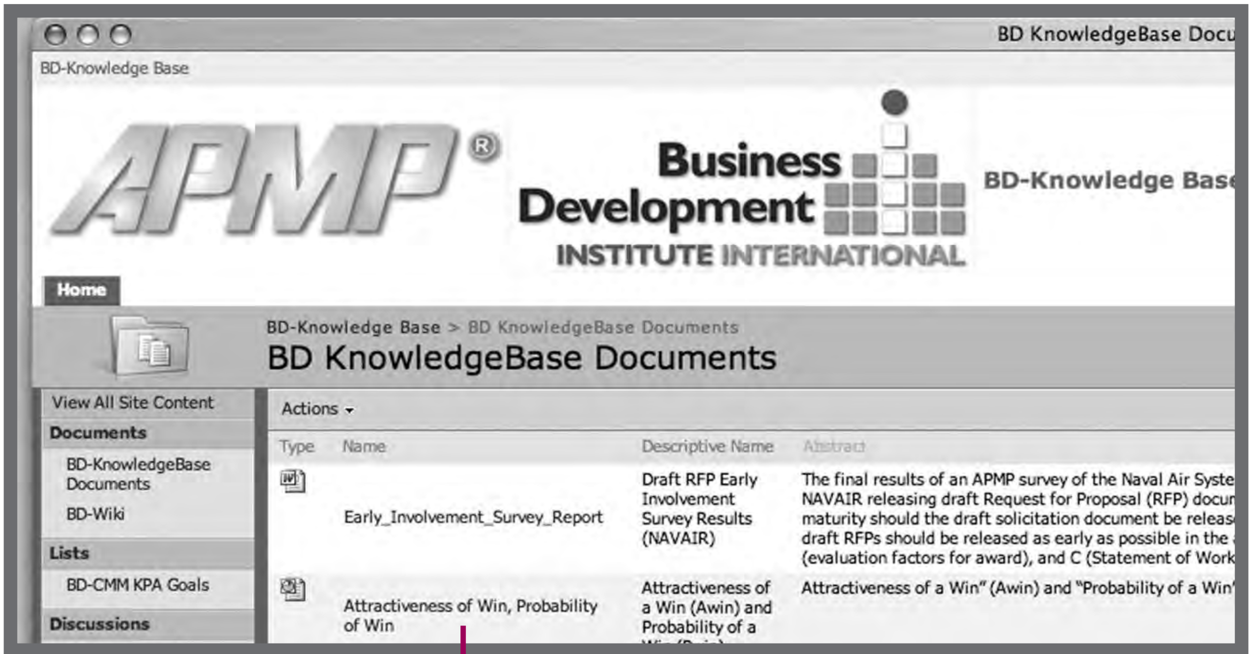


Figure 9. Results for "Capture Planning."

Results displayed for metadata filter Process Phase—Capture Planning

Additional Information on Metadata Categories

The following table provides additional information when using the metadata categories for searching.

Metadata Categories	Searchable Values	
Business Development Process Phase *Eight generally accepted phases*	• Strategic Planning • Market/Campaign Planning • Account Planning • Opportunity Identification	• Capture Planning • Pre-proposal • Proposal • Post-submittal
Competencies—APMP Proposal Manager Certification *Note: Only specific competency areas are searchable; italicized general categories are not searchable.* *For additional information on APMP Proposal Manager Accreditation and Competencies link to the Proposal Manager Accreditation area, see www.apmp.org/ca-16.aspx on the APMP Website*	• Information Research and Management – Information Gathering – Knowledge Management • Planning – Schedule Development • Development – Opportunity Qualification – Winning Price Development – Teaming Identification – Proposal Strategy Development – Executive Summary Development – Storyboard Development – Requirements Identification – Compliance Checklist Development – Outline Development • Management – Storyboard Review Management – Kick-off Meeting Management – Review Management	• Management (cont.) – Proposal Risk Management – Proposal Progress Reporting – Final Document Review Management – Production Management – Lessons Learned Analysis and Management – Proposal Process Management • Sales Orientation – Customer Interface Management – Capture Plan Development – Winning Strategy Development – Negotiation Planning – Sales Participation • Behavior and Attitude – Communication and Persuasiveness – Quality Orientation – Building Strategic Relationships and a Successful Team – Decision Making and Delegating Responsibility

continued next page

<table>
<tr><th>Metadata Categories</th><th colspan="4">Searchable Values</th></tr>
<tr><td>BD-CMM Key Category (KPC)
For additional information on the Business Development Capability Maturity Model, link to the BD-CMM site, www.bd-institute.org</td><td colspan="2">• Customer
• Focus: Management
• Focus: Quality
• People</td><td colspan="2">• Capabilities: Process
• Capabilities: Infrastructure</td></tr>
<tr><td>BD-CMM Key Process Area (KPA) and Level
For additional information on the Business Development Capability Maturity Model, link to the BD-CMM site, www.bd-institute.org</td><td colspan="2">• Response Generation (L2 Customer)
• Solution Development (L3 Customer)
• Relationship Management (L4 Customer)
• Innovation and Transformation (L5 Customer)
• BD Administration (L2 Management)
• Organizational Tactics (L3 Management)
• Enterprise Influence (L4 Management)
• Innovation and Transformation (L5 Management)
• Quality Control (L2 Quality)
• Quality Management (L3 Quality)
• Quantitative Process Mgmt (L4 Quality)
• Innovation and Transformation (L5 Quality)
• Individual Skills Development (L2 People)</td><td colspan="2">• Organizational Competencies (L3 People)
• High-Performance Teams (L4 People)
• Innovation and Transformation (L5 People)
• Sales/Capture Procedures (L2 Process)
• BD Processes (L3 Process)
• BD System Integration (L4 Process)
• Innovation and Transformation Process (L5 Process)
• Work Environment (L2 Infrastructure)
• Support Systems (L3 Infrastructure)
• Infrastructure Management (L4 Infrastructure)
• Innovation and Transformation (L5 Infrastructure)</td></tr>
<tr><td>BD-CMM Common Factor
For additional information on the Business Development Capability Maturity Model, link to the BD-CMM site, www.bd-institute.org</td><td colspan="4">• Commitment to Perform
• Ability to Perform
• Activities Performed
• Measurement
• Verification</td></tr>
<tr><td>Geographic Identifier
Identifies key practices specific to specific geographies
This category is tagged infrequently as most information has more universal application</td><td>• United States
• United Kingdom
• Australia
• Belgium
• Canada
• Costa Rica
• Czech Republic</td><td>• Denmark
• France
• Germany
• Greece
• India
• Indonesia</td><td>• Italy
• Korea
• Kuwait
• Lebanon
• Netherlands
• Nigeria</td><td>• Norway
• Saudi Arabia
• South Africa
• United Arab Emirates
• Vietnam</td></tr>
<tr><td>Form of Content</td><td colspan="2">Examples of key practices
• Metrics
• Definitions
• Checklists
• Process Decryptions</td><td colspan="2">• Position Descriptions
• Tools and Templates
• Guidelines
• Syllabus</td></tr>
</table>

Charlie Divine serves as Chairman of the KnowledgeBase Working Group responsible for building the BD KnowledgeBase. He is a Certified BD-CMM Appraiser. As an independent consultant, his focus is to coach and teach business development professionals how improved processes can provide their organizations a competitive advantage. He has served on the APMP Board of Directors as the Commercial Director, and he has been honored as an APMP Fellow. Mr. Divine is also a Certified Proposal Professional. He can be contacted at charliedivine@bd-institute.org.

Chapter Spotlight

by John Elder, AF.APMP

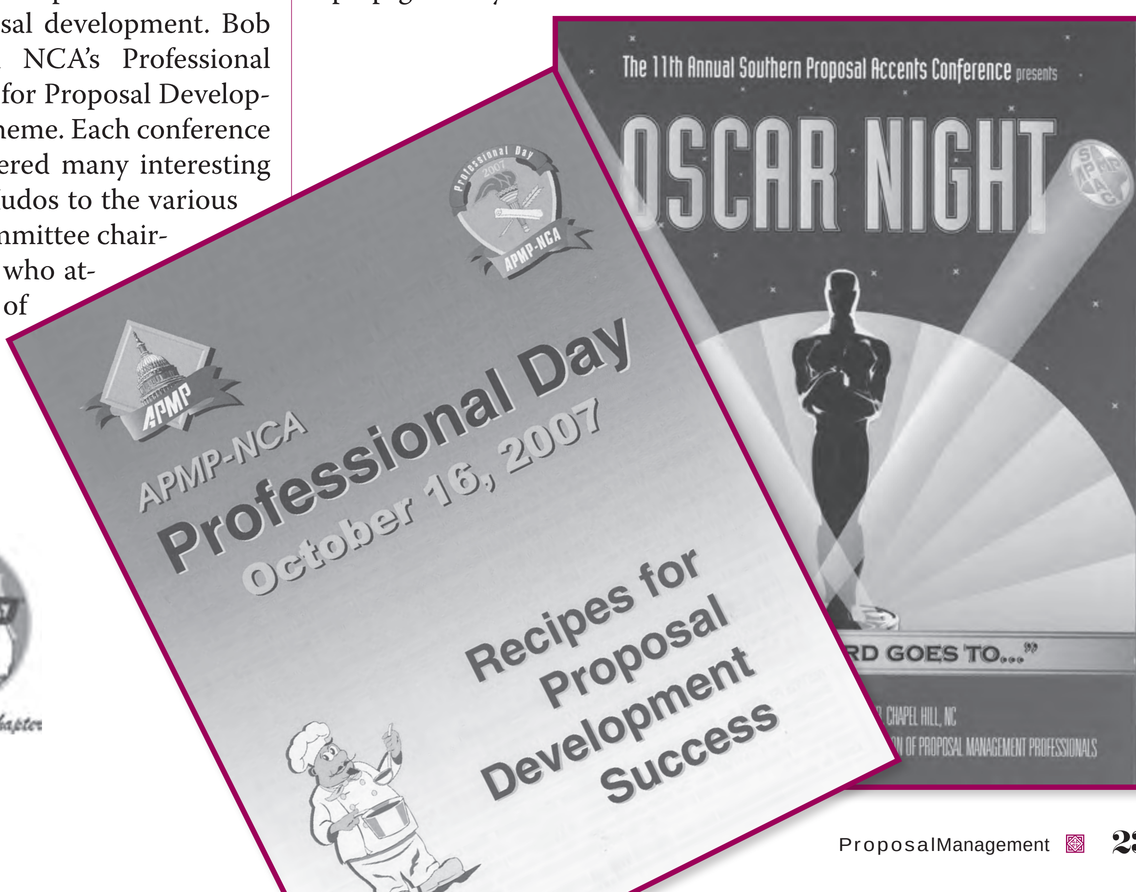
I hope that you were able to attend one the regional conferences sponsored by several local chapters. These events offer a chance to network with other professionals in your region to exchange ideas and best practices. It is an excellent opportunity to make contacts, gather some tricks of the trade, and get to know the members who serve leadership positions within APMP at the national and chapter levels. Most important, your participation supports the efforts of APMP's local chapters, which are the lifeblood of our Association.

Your participation supports the efforts of APMP's local chapters, which are the lifeblood of our Association.

I attended the 11th Annual Southern Proposal Accents Conference (SPAC) in Chapel Hill, NC sponsored by the Carolina and Georgia-Chattahoochee chapters and the APMP-NCA Chapter's Professional Day in Fairfax, VA. SPAC's Conference Co-Chairs, Melissa Church-Lawton, Keith Propst, and David Sotolongo, used the theme, "Oscar Night: And the Award Goes to…," to provide an entertaining take on proposal development. Bob Lohfield spearheaded NCA's Professional Day that had "Recipes for Proposal Development Success" as the theme. Each conference was a success and offered many interesting topics and speakers. Kudos to the various committee and subcommittee chairpersons and everyone who attended one or more of these events.

The APMP is now a brighter organization! The Florida Sunshine Chapter of the APMP was chartered in September. The first meeting was held on October 2, and attracted 37 attendees. Formed as a virtual chapter, the Florida chapter plans to meet four times a year with most meetings held by webinar and conference call. There may be some physical meetings/events held by the chapter. For more information about the Florida chapter, contact Chuck Keller at kellerpdt@aol.com or 850-497-8206.

The APMP is also growing internationally. The Organizing Committee for the APMP Germany Chapter submitted its formal petition to the APMP office to charter a Germany-Austria-Switzerland chapter, which the APMP Board has approved. This new chapter plans to host the official chapter kickoff on October 30 in Munich, Germany. Please visit http://www.apmp.de or http://www.apmp-germany.de for more information.



APMP
Florida Sunshine Chapter

A Look AT INDUSTRY & GOVERNMENT ACQUISITION LIFECYCLES

by Jessica Morgenstern

The APMP's Industry-Government Business Development/Source Selection Integrated Process Task Force, also known as the Acquisition Task Force, is comprised of acquisition professionals within the Government representing the Department of Defense and about a dozen business development/proposal professionals from Industry. The Acquisition Task Force identified points during the procurement cycle where Industry and Government interact. The following is an abridged version of the Task Force's final report that was presented at the 2007 APMP Annual Conference in Savannah, GA. The entire report can be downloaded from the APMP Task Force page of the APMP Website (http://www.apmp.org/ca-22.aspx).

From Discussions to Action

As the premier association dedicated to promoting the best practices throughout the business development lifecycle, the APMP provides members with many opportunities to engage in discussions devoted to business development. Over the past several years, members representing both Government and Industry have had informal discussions about the procurement challenges facing both sides.

As these informal discussions progressed, it became clear that a more formal approach should be instituted to collect their content and gain a better understanding of the procurement processes used by both Government and Industry. All agreed that the Government has little way of knowing how Industry reacts to a procurement activity. Conversely, Industry has little way of knowing what goes on within the Government during a procurement.

Participants in these initial discussions also agreed that the less interaction (touch points) between the Government and Industry throughout the procurement process, the more opportunity there is for miscommunication. This can take the form of requests for proposals (RFPs) that do not adequately reflect the true needs of the client or are difficult to understand, or can result in lower-quality solutions and proposal responses submitted by Industry. For example, in not fully understanding what goes on behind the scenes in the Government, Industry tends to believe that the Government is withholding information critical to Industry's understanding of the procurement and its ability to respond effectively. From the Government's perspective, the need to share information with Industry has to be balanced with the need to maintain a level playing field and not mislead Industry. Lack of judgment by the Government about how to share information can cause expensive and time-consuming protests later on.

As a result of these informal conversations and the joint realization that better understanding would lead to more efficient procurements, the Industry-Government Business Development/Source Selection Integrated Process Task Force was created in June 2006. This report is the work of a team from both Industry and Government. The team is dedicated to the common goal of improving the way that the Federal Government approaches the acquisition cycle and how Industry responds with their business development lifecycle. Based on the work of the Task Force, we can begin to improve the respective processes and advance the art of acquisition.

Task Force Goals

Our initial concept was to:

- Identify the current (As-Is) processes followed by both Government and Industry for procurements
- Determine where the existing touch points (exchanges of information) occur.

We accomplished this initial concept through the work that we completed in May

2007 and presented a report at the Annual APMP Conference in Savannah, GA.

Our subsequent goal is to create an improved (To-Be) process that allows more effective procurement efforts by better aligning the Government's procurement lifecycle with Industry's business development lifecycle, and increasing the frequency of touch points. It is a goal of both Industry and Government to reduce the time and cost associated with a procurement, while increasing the quality of solutions and how they are presented by Industry. By identifying clearly understandable processes, all parties can improve their planning capabilities and set a clear, continuous improvement path. This goal is the work of the Acquisition Task Force for 2007-2008. We plan to present the findings of this goal at the 2008 Annual APMP Conference in Palm Springs, CA.

Lack of judgment by the Government about how to share information can cause expensive and time-consuming protests later on.

The Task Force's Approach

Identify As–Is Process

As a first step, we created process flow charts (see Figures 1 and 2 on pages 34 and 35) for each process. Our goal was to provide a concise visual representation of each step of the procurement lifecycle.

The process flow charts depict the major phases (verticals) that compose these processes. Within each phase, we have identified the activities, the way in which exchanges are handled, and the products that result from each effort. Also shown are the roles of those who lead each effort, the roles of those who support each effort, and the Federal Acquisition Regulations that govern how each effort is handled. This process addresses both products and services procurements, as well as requirements for new systems versus upgrades/improvements to existing technology (programs).

The Government process reflected in Figure 1 encompasses the entire lifecycle from the time the requirement is initially identified through the debriefing provided to Industry bidders after contract award. Figure 1 shows the process that is currently used by the Government agencies represented by members on this Task Force and may not be fully representative of the procurement processes used by other Government agencies. The intent is to provide a representative, or notional, process so that we can better understand how each entity operates on any given procurement, and how they interact (touch points).

Our second step was to write a comprehensive explanation of each activity, interaction, and product so that Industry has a better understanding of the Government's efforts each step of the way through the procurement lifecycle. Understanding what efforts are expended by Government agencies helps to explain why some activities take as long as they do to complete. This narrative is also designed to help ensure that readers understand the Government's definition of the various steps of their process. For example, the Procurement Planning Conference (which can be referred to by a few different names) is fully described so the Industry reader can understand its purpose and the actions that come as a result of the conference. We also provide a description of each role (participant) associated with a procurement.

Figure 2 is a graphic depicting Industry's business development process, which encompasses the entire lifecycle from identifying an opportunity through contract award. Included is a comprehensive explanation of each activity, exchanges with the Government, and results from those efforts. This narrative is also designed to help readers understand Industry's definition of its various process steps. Understanding what efforts are expended by Industry helps explain how Industry uses or reacts to information provided by the Government, including the allocation of resources and funding, and how pursuit/no-pursuit and bid/no-bid decisions are made.

Figure 2 also represents a framework comprised of processes currently used by the

Industry representatives on this Task Force. It will not be fully representative of the procurement processes used by all corporations. It does represent best practices as espoused by APMP and corresponds with the APMP Body of Knowledge currently being drafted, as well as the Business Development Capability Maturity Model (BD-CMM) from the Business Development Institute International. Our intent is to provide as thorough and comprehensive a framework as possible so that we can better understand how each entity operates on any given procurement, and how they interact (touch points).

Determine Existing Touch Points

The two figures show where activities and tasks currently link the business development and source selection processes, creating interactions between the Government and Industry. The existing interactions are listed under exchanges in each phase. We expect that further evaluating the common touch points and examining the two process flow charts side by side will help us identify:

- Areas where there can be increased efficiencies and reduced process time
- Critical alignment points that result in process disruption when the Government or Industry does not act as expected (or in a predictable way) and/or on time.

Further, by fully understanding the roles and responsibilities of both entities, we can identify additional areas of improvement. These findings will be presented during the second phase of the Task Force's effort in 2008.

Results

Once the graphics were complete and the accompanying narrative near finalization, the team discussed their impressions of the results. Initially, we determined how Government and Industry work together now and presented those findings at the 2007 Annual APMP Conference. Our next step will be to identify how we can improve, and then implement, process improvements. Those findings will be presented at the 2008 Annual APMP Conference. However, we came to the realization that there can be an immediate improvement on how we participate in the procurement process today. Given that the Industry process reflects best practices advocated by the APMP and BD Institute, the team determined that the first and most effective step towards improvement would be for all Industry to adopt the As-Is process, to the greatest extent possible, within their business development organizations.

Concurrently, we agreed that Government procurement agencies should more strictly adhere to their existing process. For example, sometimes the Government procuring agency elects to eliminate a step or two in the interest of reducing the procurement time. Government members of the Task Force recognize how eliminating steps can adversely affect Industry's ability to effectively respond to an RFP. If both Government and Industry faithfully follow the As-Is process, that effort alone would help resolve many communication and deliverable issues that exist today.

> *...we came to the realization that there can be an immediate improvement on how we participate in the procurement process today.*

Action

The Task Force gave a presentation at the 2007 Annual APMP Conference to introduce this Task Force effort and present both the report and our findings. In addition, recognizing that there needs to be wider dissemination of the As-Is process and accompanying narrative, we developed a listing of Government acquisition professionals who were notified of this Task Force's efforts and invited to attend the Annual APMP Conference.

The Conference presentation and report were well received. Feedback the Task Force was given included comments such as:

"Thank you very much for all the materials—and for a great session, truly one of the best (and best prepared) I've ever attended"!

"I thoroughly enjoyed the session and appreciated the insight and views that were discussed. It's obvious that a lot of time and effort was put into the group presentation and I think it was well worth it. You seem to have a great dialogue with the Government folks that participated."

"Perhaps you could consider putting out a longer session of this seminar for the conference next year, perhaps a day-long one. This was a very interesting session and benefits everyone, including entry-level, intermediate, and advanced proposal professionals."

"I was sure tired during the conference (Clark Kent during the day for the conference and Superman in the evenings with proposal work), but your panel discussion was entertaining and educational. Excellent work"!

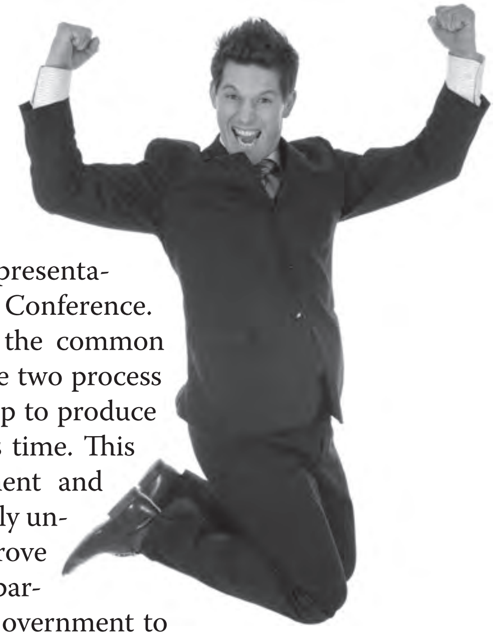
The feedback and interest received as a result of the presentation made at the Annual Conference certainly encourages the Task Force to continue its work. The Task Force is adding new members to its ranks as a result of the interest that was generated and the excitement people exhibited at the Conference. Any comments or questions concerning the contents of this article may be addressed via email to GovernmentLiaison@apmp.org.

Understanding what efforts are expended by industry helps explain how industry uses or reacts to information provided by the Government.

Task Force Findings

Disconnects between the Government's source selection process and Industry's business development process creates unnecessary delays in acquisitions. Further, neither side clearly understands the causes and effects of their actions, which can result in misunderstanding, additional work or rework, and delayed schedules.

The Industry-Government Business Development/Source Selection Integrated Process Task Force has created an As-Is business development/source selection set of process flow charts. These charts show when activities and tasks create an opportunity for Industry and the Government to interact. For example, in the lifecycle of a source selection effort, there are specific times when Government seeks input/feedback from Industry and times when Government does something as part of its process that causes Industry to react. This As-Is model was the basis of a presentation at the 2007 Annual APMP Conference.



We expect that evaluating the common touch points and examining the two process flow charts side by side can help to produce efficiencies and reduce process time. This would benefit both Government and Industry. Also, identifying clearly understandable processes can improve the planning capabilities of all parties and enable Industry and Government to set a clear, continuous improvement path.

The materials that follow include an individual process chart for Government and Industry and a selected set of definitions. The charts depict the major phases (verticals) that compose these processes. Within each phase we have identified and defined the major activities, the way in which exchanges are handled, and the products that result from each effort. In addition, we have identified the role that leads the vertical and the major participants who work together with the lead. For each phase, the content of the relevant activities, exchanges, and products are defined. A description of lead and participant roles is also included.

Government Competitive Solicitation Process

The Government Competitive Solicitation Process (see Figure 1) consists of five major phases, each of which is divided into the sub-phases described below.

Requirements Generation

Identify Requirement. The identification of a requirement is a collaborative effort among the Government user (i.e., customer), the Government procuring agency (program office), and Government/Industry technology centers (laboratories/contractors).

Shortfalls in capability or the perception of new requirements by the Government user are normally the driving force to generate a new acquisition. The program office becomes the critical broker between the customer and Industry to link the requirement with the development of the potential solution options that can be offered by Industry.

Requirements Generation and Program Funding. This sub-phase focuses on formalizing the requirement, evaluating potential technologies to achieve the needed capability, and performing trade-offs through coordination with Industry. The next step in DoD and Service environments is to draft the Acquisition Program Baseline (APB). Other agencies may have a similar type of document that they use. In addition, depending on the extent of new technology that will be applied to achieve the required capability, the planning of a Technology Development Phase will need to be addressed at this time.

We expect that evaluating the common touch points and examining the two process flow charts side by side can help to produce efficiencies and reduce process time.

Acquisition Planning

Preliminary Acquisition Planning. Exchanges of information among all interested parties, from the earliest identification of a requirement through receipt of proposals, are encouraged. Any exchange of information must be consistent with procurement integrity requirements. Government-Industry exchanges become increasingly formal as the process approaches release of the final RFP, by which time the Procuring Contracting Officer undertakes full control over the exchanges. This control may be exerted even earlier in the process, especially if the draft Sections L and M are released. In this stage, market research and increasing the interest of Industry in participating in the upcoming competition are still the primary purpose of the Government exchanges with Industry. Interested parties include potential offerors, end users, Government acquisition and supporting personnel, and others involved in the conduct or outcome of the acquisition.

Integrate Market Research. Industry may ask questions as the result of site visits, one-on-one meetings, and/or the review of any preliminary documents that might be available for public comment prior to release of the formal Draft RFP (DRFP). Answers to questions are usually posted to an electronic bulletin board or provided by email to all potential offerors. The Government will try to protect any proprietary or corporate-sensitive content of an individual question.

Finalize Acquisition Strategy. While the acquisition strategy is being finalized, there typically are no formal exchanges with Industry. This is a Government-only activity. However, in some instances, it may be appropriate and to the Government's benefit to invite potential offerors to the review meeting to obtain Industry input on the Government's proposed acquisition strategy. This review activity is normally limited to larger dollar value and/or complex acquisitions.

Solicitation Process

Develop Draft Request for Proposals (DRFP). DRFP development starts early in the Acquisition Planning stage. Out of the Requirements Generation phase, the specification and the SOO or SOW and the WBS start to take shape. For more complex programs, it is not unusual for the Government to send out many revisions of the specification for comment before it starts to stabilize. These interchanges enable the Government to develop the specification and also help shape the acquisition strategy. These interchanges provide Industry with early insight into the standards for the evaluation.

Issue Request for Proposals (RFP). The final RFP may be issued after it has been synopsized in the FedBizOps and when the requirements are considered stable and the evaluation approach is established. The requirements are considered stable after the appropriate capabilities document and Acquisition Strategy/Plan are signed. The evaluation approach is established when the Source Selection Plan is signed. Once these documents have been signed, the RFP can be released if it is considered to be technically and contractually sound and legally sufficient. This is accomplished through a set of internal Government reviews, which also include consideration of all Industry comments. Finally, the Source Selection Authority (SSA) must approve the SSP before the Contracting Officer issues the final RFP. For Acquisition Category (ACAT) I and II programs, even higher-level review may be required.

The evaluation approach is established when the Source Selection Plan is signed.

Proposal Receipt and Evaluation

Receive Proposals. The contracting officer takes the lead in determining that proposals were delivered to the designated point at or before the time and date stipulated in the RFP. After making this determination, the contracting officer informs any offeror of late receipt, as appropriate, and whether or not that proposal will be considered.

Evaluate Proposals. The contracting officer controls all exchanges with offerors after receipt of proposals. These exchanges must include a description of the type of exchange being conducted: clarifications; communications, which may occur before competitive range establishment; or discussions (negotiations or bargaining), which occur only after the competitive range is established. In accordance with the Evaluation Criteria, site visits or surveys of the offeror's facility may be conducted during the evaluation.

Award and Debrief

Award Contract. The contracting officer awards a contract to the successful offeror or sole source awardee by furnishing the executed contract or other notice of the award to that offeror. If the award document includes information that is different than the latest signed proposal, as amended by the offeror's written correspondence, both the offeror and the contracting officer sign the contract award.

Debrief. Any offeror excluded from the competitive range or otherwise excluded from the competition before award may request a debriefing either before or after award. All offerors (successful or unsuccessful) may request a debriefing by submitting a written request to the contracting officer within three calendar days after receipt of the notice of exclusion from the competition, or receipt of notice of contract award. The Government, to the greatest extent possible, will generally try to provide the debriefing within five days from the request. If a pre-award debriefing is requested, but delayed until after award, it will include all information normally provided in a post-award debriefing.

Within each of the sub-phases, we identified three major focus areas. The complete report defines all of the bullets that appear in each sub-phase's three major focus areas:

- Activities
- Exchanges with Industry
- Products.

In addition, we defined the roles and responsibilities of the leads and participants for the Government competitive solicitation process in the report.

The Government attempts to balance openness with their obligation to maintain a level playing field and concerns over protest. The appearance of being unfair or misleading is as important as avoiding being unfair or misleading in practice. Often draft SOWs and SOOs, as well as DRFPs, are lacking in detail because of concerns that the information is not complete and could be misleading. A miscommunication or perceived violation of procurement integrity could ultimately be grounds for a protest. These concerns and precautions sometimes cause the Government to be more restrictive in its communication and sometimes lead Industry to think that the Government is hiding something, which can in turn lead to mistrust. A mutual understanding of motives and needs may result in a better alignment of actions between Government and Industry.

The Industry Competitive Solicitation Process (see Figure 2) consists of five major phases, each of which is divided into the following sub-phases:

> *For more complex programs, it is not unusual for the Government to send out many revisions of the specification for comment before it starts to stabilize.*

Marketing

Identify Opportunity. As the Government identifies a requirement, Industry identifies it as an opportunity. Identify opportunity is the phase that identifies the requirement that the Government is planning to put out for procurement. Various activities are conducted to ensure that preliminary information collected provides enough information to make a first-cut decision as to whether the company should continue to pursue the opportunity.

Qualify Opportunity. This phase provides more detailed information about the opportunity so that company decision makers can make a decision about whether to pursue the opportunity to the next phase.

Capture Management

Preliminary Opportunity Planning. Once a pursuit review is held and the company determines that this is an opportunity worth pursuing, the activity moves into capture management. This consists of four major phases; preliminary opportunity planning is the first.

Market Survey. The information assessed and used in this phase is valued input to both the Preliminary Opportunity Planning and Pursuit Strategy Meeting phases later on.

Pursuit Strategy Meeting. Another meeting is held to determine if the capture management activities are on the right track. Strategy is shared to determine additional activities that can lead to a successful capture.

Pursuit Positioning Complete. As the last step of the capture management, this sub-phase ensures that the team is ready to move forward to the next phase.

Bid and Proposal (B&P)

Receive Draft Solicitation. Release of the DRFP to the contracting community may be anywhere from a few weeks to several months before the final RFP is expected to be released. It may be received by Industry in different ways, depending on the size of the procurement and the procuring agency. In most instances, the DRFP is posted to the agency's Website, and it is Industry's responsibility to continually check the Website so as to receive the document as soon as possible. In some circumstances, the procuring agency either sends the DRFP (or sends notification that the DRFP is available) to a specific list of pre-qualified contractors. The purpose of the DRFP is to solicit questions from Industry to assist the procuring agency in refining the final RFP by addressing the issues raised during this time. Normally, after DRFP or RFP release, all communication is through the agency contracting office so that the procuring contracting officer (PCO) can control communications and information flow to ensure a fair and open competition, which includes Industry access to all non-proprietary information. Industry typically starts developing proposals based on the DRFP. Many of the activities in this sub-phase are proposal activities that can be started with a DRFP. Some Industry processes call for drafting text and holding an initial text review before the final RFP is released.

Receive Solicitation (Final). Release of the final RFP signals the start of the process to submit a compliant proposal that addresses all requirements and ensures a best value to the Government. The best value will be defined in the proposal evaluation criteria. After RFP release, all communication must be through the agency contracting office so that the PCO can control communications and information flow to ensure a fair and open competition, which includes Industry access to all non-proprietary information.

Deliver Proposal. The prime contractor delivers the proposal to the Government and then waits for the Government to determine the next steps. This may be questions and answers, final proposal revisions, or award.

Proposal Evaluation. The Government evaluates the proposals received through a formal process. Each proposal is evaluated against the proposal evaluation criteria identified in the final RFP.

Award Contract

The Government notifies both the successful bidder and the unsuccessful bidders of the result of the proposal evaluation. The contract is signed, and work can begin. Requests for debriefs are submitted, and the Government provides a debrief presentation to all who request the meeting.

Focus Areas

Within each of the sub-phases, we identified three major focus areas. The document defines all of the bullets that appear in each sub-phase's three major focus areas:

- Activities
- Exchanges with Government
- Products.

In addition, we defined the roles and responsibilities of the leads and participants for the Industry competitive solicitation process.

Next Steps

The complete final report will be included in the APMP's Body of Knowledge and may evolve into a basic APMP competitive solicitation acquisition guide. The entire report can be accessed at http://www.apmp.org/ca-22.aspx. For more information, contact Jessica Morgenstern, APMP Director of Strategic Initiatives, at 443-755-6301, or email her at GovernmentLiaison@apmp.org.

ACKNOWLEDGEMENTS

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Dana Spears	Northrop Grumman Space Technology
Steve Stryker	Stryker Associates
Mike Weinberger	Arrowhead Global Solutions, Inc.

Jessica Morgenstern, General Dynamics Senior Manager, Business Development, has more than 25 years' experience as a software engineer, senior business developer, capture manager, and senior proposal manager. An APMP member for more than five years, she is the Director of Strategic Initiatives on the APMP National Board of Directors. She received the 2004 APMP Compatriots Award for work on the Early Industry Involvement Survey and was named an APMP Fellow in 2007. Ms. Morgenstern can be reached at 443-755-6301 or at GovernmentLiaison@apmp.org.

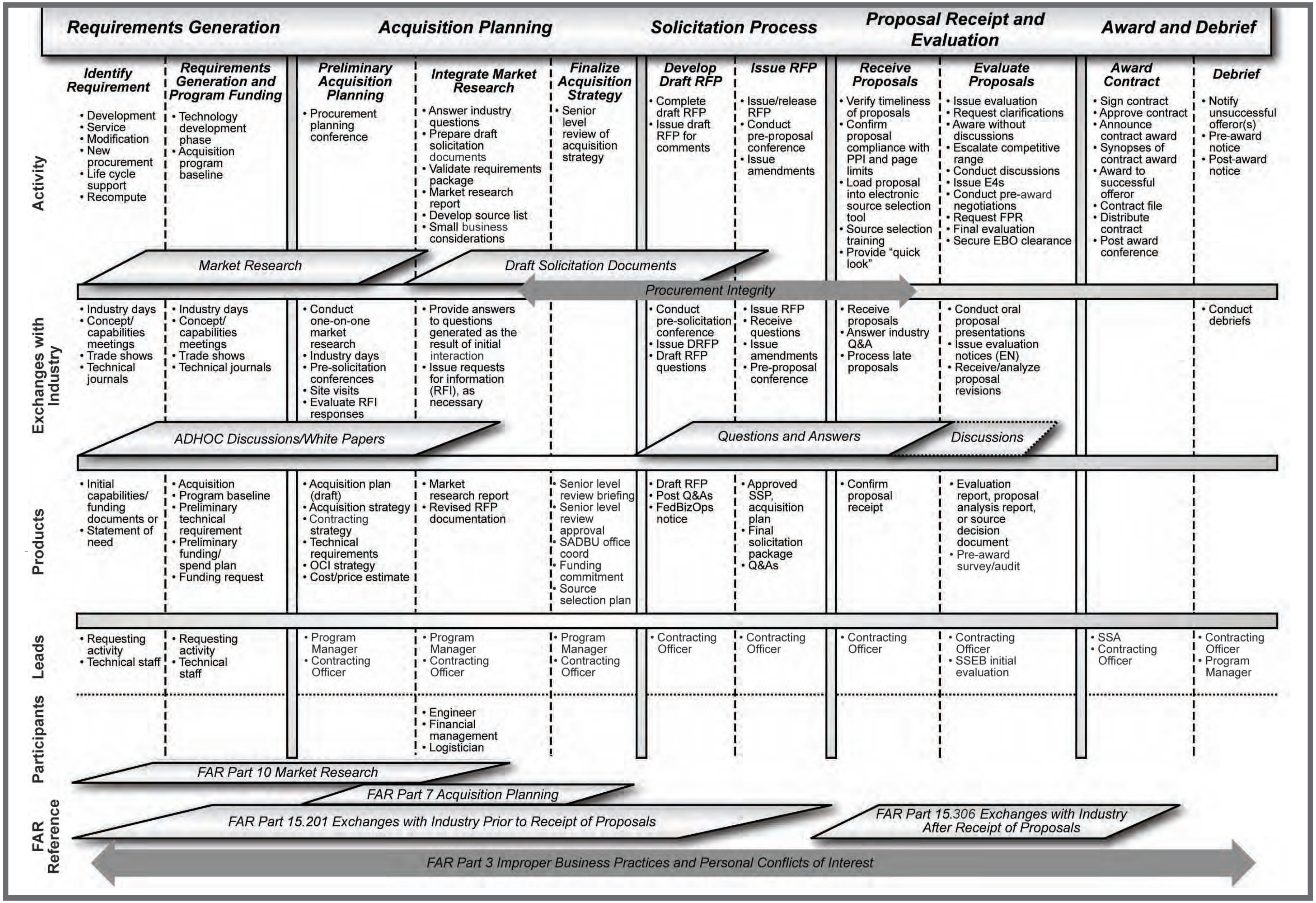

Figure 1. Notional Government competitive solicitation process.

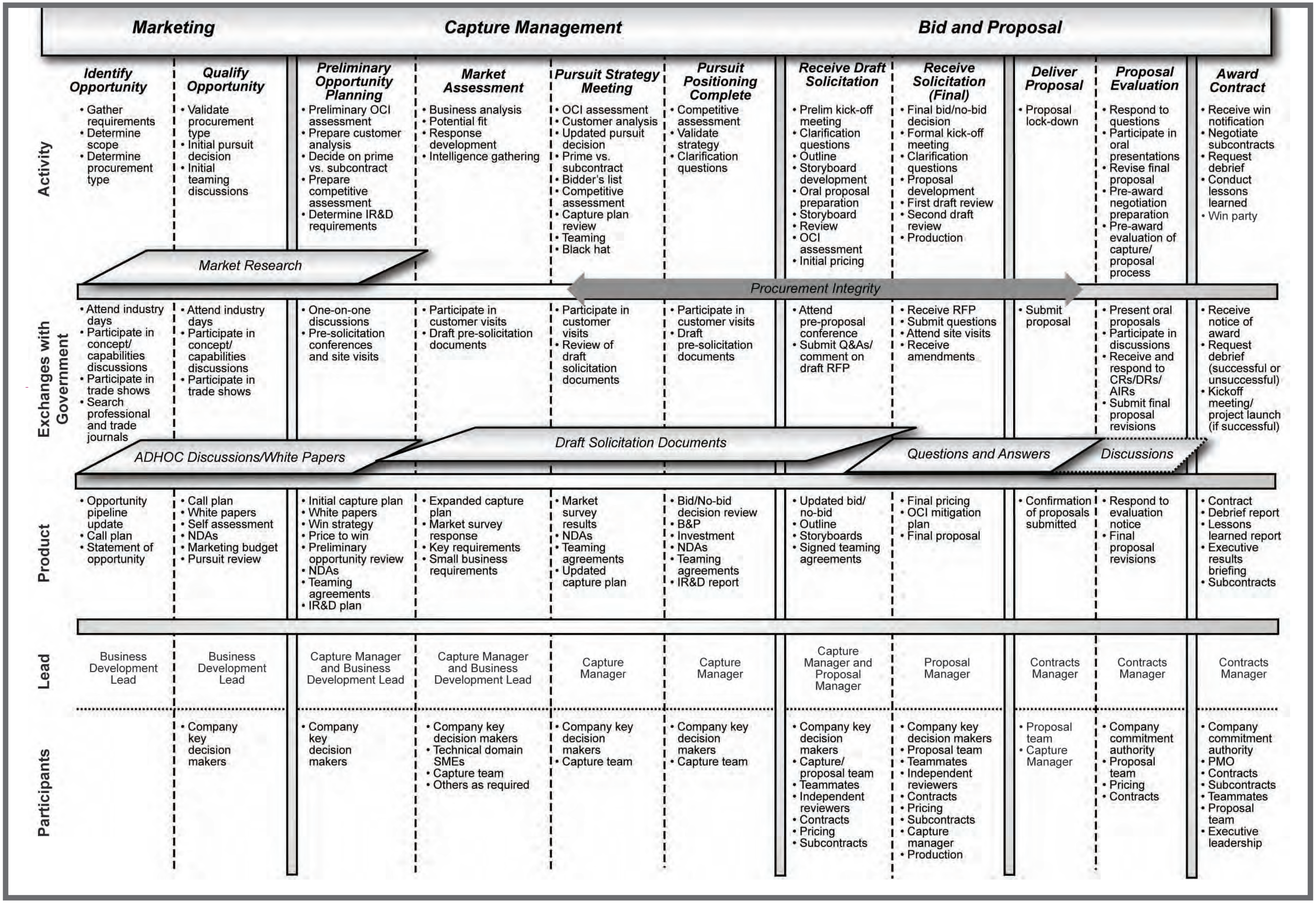

Figure 2. Notional industry opportunity pursuit framework.


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Strong Branding in Proposals Increases Success:

The Results of a General Binding Corporation/ Association of Proposal Management Professionals Survey

by Kellie Glueck

The Importance of Branding

Do your proposals reflect your organization's brand? If so, what are the benefits of a consistent brand message? If not, how is the absence of the brand hurting the proposal and its chances of winning business? A new survey study co-sponsored by General Branding Corporation (GBC) and the Association of Proposal Management Professionals (APMP) asked these questions and yielded some surprising results.

For example, nearly a quarter of all respondents said their organizational brand message does not consistently appear in proposals. More importantly, proposals without a strong brand message are less than half as likely to be successful as those that do incorporate it.

Experts agree that branding is central to the success of every organization. In fact, some believe the brand represents 30 percent or more of the company's value. But in order for branding to work, it must be carried through every internal and external activity of the organization—and this includes proposals.

Strong Branding in Proposals Increases Success

GBC and APMP joined forces to discover the differences between companies that speak with one "branding" voice and companies that experience disconnects between proposal developers and marketing. GBC, an ACCO Brands Corporation, is one of the world's largest suppliers of branded office products with 2006 revenues of $1.96 billion and market products in more than 100 countries. ACCO Brands Corporation is a world leader in select categories of branded office products, with annual revenues of nearly $2 billion. Its industry-leading brands include Day-Timer®, Swingline®, Kensington®, Quartet®, GBC®, Rexel®, NOBO®, and Wilson Jones®, among others. Under the GBC brand, the company is also a leader in the professional print finishing market.

The survey was designed to discover the relationship between strong brand communication in proposals and the success of proposals. In the process, the survey disclosed:

- Causes of branding inconsistency between marketing activities and proposals
- Ways to incorporate branding more effectively in proposals
- The importance of communicating brands in proposals
- The consequences of failing to communicate brands in proposals.

There were a total of 312 respondents comprised of 52 APMP conference attendees who completed the survey at a kiosk and 260 people, mostly APMP members, who completed the survey online.

Respondents held a wide variety of titles. Proposal-related titles were the most frequently mentioned (55 percent). Respondents were employed primarily in bid, business development, marketing, proposal, or sales departments within their sectors, which included aerospace/defense/federal contractors; business/industry/commercial companies; academia; government; international companies; and consultants.

Branding is More than Just the Logo

According to the Harvard Business Review, "Branding is often confused with logos or trademarks. A trademark is a distinguishing name, sign, symbol, or design or some combination of them, that identifies the goods or services of one seller. A brand is a distinctive identity that differentiates a relevant, enduring, and credible promise of value associated with a product, service, or organization and indicates the source of that promise. Of course, the promise of value must be relevant to the people or businesses a company wants to have as its customers" (Ward et al, 1999).

Experts agree that branding is central to the success of every organization. In fact, some believe the brand represents 30 percent or more of the company's value.

In other words, an organization's brand goes far beyond the logo, and the survey developers agreed.

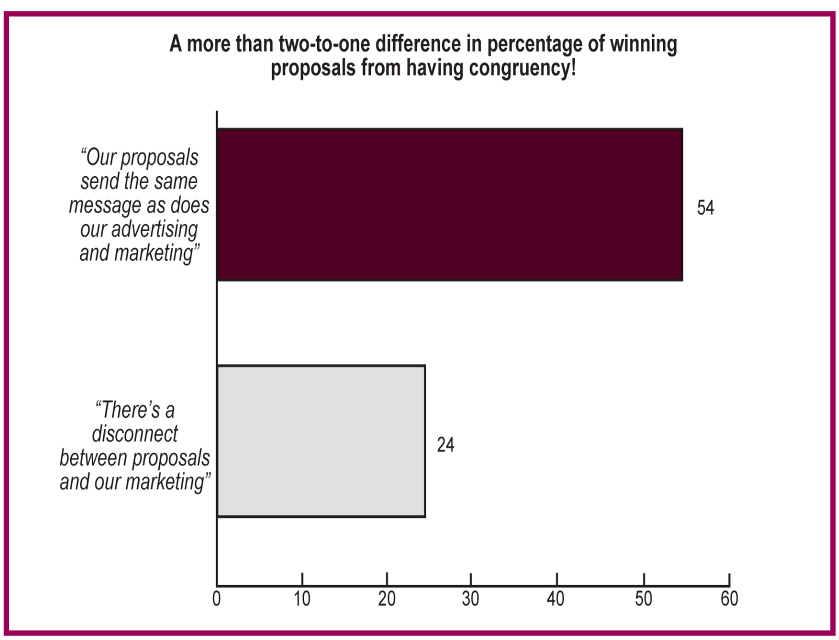
The term "brand," for purposes of this survey, means both the visual expression of a company, such as logo, colors, font, typeface, and the company's substance of character—inherent value, unique services, key messages, and customer experience with the company. Brand encompasses everything that comes to customers' minds when they hear the company name mentioned.

Most Organizations Realize the Importance of Branding in Proposals

Survey results show that 93 percent of respondents believe a company's brand is either extremely or somewhat important in getting a proposal to the final bid stage.

Most (77 percent) say their organization is sending a consistent branding message across marketing activities and proposals, yet 23 percent recognize that is not the case.

Powerful brands make promises that are verifiable and persistent. Some companies



Percent of proposals that result in winning business.

Case Study: Partnering with Branding Consultants

A national commercial real estate giant with 150 offices was studying how to create standardized presentation solutions that further strong brand recognition, are easily available to many locations, and keep costs down.

The company saw the inconsistency in its presentation materials and was justifiably concerned about the impact that was having on its corporate image. To prevent brand erosion caused by the many different ways each office packaged and presented its materials, the company needed a plan.

Because each satellite office purchased materials independently using multiple local vendors, printed communications were both inconsistent and time-consuming. The company was also missing the significant savings of national contracts and volume discounts.

Working one-on-one with a GBC brand image consultant, the company chose to customize a number of stylish, high-quality presentation solutions, including proposal covers, index tabs, pocket folders, and packaging. The consultant took an extra step by delivering samples of each product to every satellite office.

By committing to a unified look and feel, the company eliminated unnecessary suppliers and, at the same time, reaped the benefits of a national pricing contract. This allowed them to unify and upgrade their materials while lowering costs. More importantly, the quality and uniformity of proposal materials now convey the confidence and service level that are a signature of the company's brand.

ask too much of their brand—burdening it with too many promises and/or promises that are difficult for the products and services to fulfill. As world-leading companies know, making a promise and having the ability to keep it consistently is a significant competitive advantage in itself.

If the brand is well controlled and unified, it is one of the most valuable assets any company can own. In fact, experts believe a brand can represent more than one-third of the value of a company.

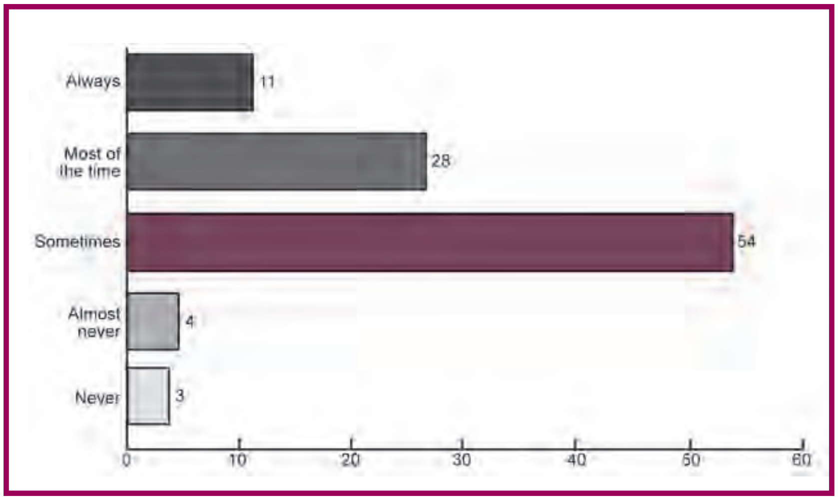
Conveying a brand strongly and consistently also tells others that the company takes full responsibility for the quality and performance of its products and services. Scott Ward writes in the Harvard Business Review, "Companies in many industries use numerous sources for their product components. However, the brand name indicates where the buck stops.... [Customers] want reassurance from somebody. That somebody is the creator and owner of the brand" (Ward et al, 1999).

When Bad Branding Happens to Good Proposals

According to the survey, respondents who said there was a disconnect between marketing and proposal development had a success rate average of only 24 percent. Of those who said there was a connection between marketing and proposal development, an average of 55 percent of their proposals were successful. This indicates that proposals carrying a strong branding message are more than twice as likely to win business as those that do not.

Respondents stated proposals without a strong branding message had the following characteristics:

- Slightly more than half are in the business/industry/commercial sector
- Slightly less than half submit proposals into the international or consultancy sectors
- Fewer of them are likely to use business development managers or graphic arts specialists in the proposal development process



How often brand is incorporated throughout proposal content.

- Fewer of them are likely to believe that a company's brand is extremely important for getting a proposal to the final bid stage
- Only 11 percent consistently incorporate the brand into the proposal content, and 68 percent incorporate the brand on occasion.

Branding expert Wally Olins warns against taking brand development and compliance too lightly, "Many organizations seem to have difficulty in understanding what a brand is and where it begins and ends, let alone trying to work out how to create it, how to position it, how to promote it, how to control it, how to monitor its performance, how to grow it, how to sustain its personality and character and – above all – how to make money out of it," he said. "It's tough enough with product brands where a considerable body of knowledge has been built up over more than a century, but with service brands, where corporate experience is far smaller and organizational structures are frequently so ineffective, it's even harder. The reason why so many brands fail is because creating and sustaining a brand demands skill, courage, money, determination, originality, creativity and an infinite capacity to take pains, and that is a rare combination" (Olins, 2003).

When brand compliance does not occur uniformly, customers do not perceive the company the way the marketing department wants it to be perceived. As the gap widens and the brand becomes more diffuse, customers become more confused.

This can happen when a company is undertaking a re-branding effort, but launches it incrementally—introducing advertising, public relations, marketing materials, and stationery redesign in different stages. Or it can happen when presentation materials have a branding message that is either absent or inconsistent with the company's brand.

When the initial presentation package is developed well, it makes a complete statement about the company and sends a message of professionalism and stability. It not only reassures the potential client regarding the caliber of the firm, but it can help set expectations regarding the quality of communication that will be conducted throughout the business relationship, particularly in supporting documentation and follow-up reports.

Other mistakes include trying to build brand awareness without establishing a clear brand position and having a clear brand position that is not unique among the company's competitors or that customers do not care about.

"Maintaining a strong brand means striking the right balance between continuity in marketing activities and the kind of change needed to stay relevant….the brand's image doesn't get muddled or lost in a cacophony of marketing efforts that confuse customers by sending conflicting messages" (Keller, 2000).

The Hallmarks of a Well–Finished Proposal

No one ever gets a second chance to make a first impression—trite but true. And the same goes for proposals. Before they open it, people will judge the quality of the content by looking at the quality of the proposal materials. So what makes a good first impression?

- An attractive cover that captures the reader's attention and is relevant to the content
- A functional binding that makes the proposal easy to read
- Organizational features, such as index tabs
- A consistent look that meshes with the other elements of the presentation and the company's brand.

Rooting Out the Cause of Bad Branding

The survey shows that developing and presenting proposals is a team effort, most often involving the proposal manager, business development manager, technical staff, project managers, sales directors, and other managers. But the marketing director, marketing communications manager, and marketing coordinator are frequently absent in these proposal efforts. With low or absent participation by the marketing department, respondents say the following brand disconnects occur in proposals:

- The brand message in the proposal is not the same as the brand message within the organization (45 percent)
- There is no one responsible for brand enforcement working on the proposal team (38 percent)
- The brand is not competitively differentiated within the organization (35 percent)
- The look of the brand (logo and other graphics) in the proposal is not the same as the look of the brand within the organization (24 percent)
- The organization lacks an overall brand strategy (13 percent).

While the respondents recognize the existing brand disconnects, respondents report that these disconnects are not equally important. According to respondents, the problems most in need of remediation are:

- The brand message in the proposal is not the same as the brand message within the organization (21 percent)
- The organization lacks an overall brand strategy (21 percent)
- There is no one responsible for brand enforcement working on the proposal team (18 percent)
- The brand is not competitively differentiated within the organization (18 percent).

Remediation from the Ground Up

GBC, through its work with a variety of Fortune 500 firms facing brand compliance challenges, has developed a four-tiered approach to building brand compliance.

It all starts with **Conducting a Brand Audit**. All of the printed materials from different departments, offices, locations, and franchisees should be collected and compared against the brand standards manual. They should all conform not only to the prescribed color, size, and logo treatment specified in the manual, but also the key messages and value proposition. Comparing materials this way gives companies the ability to quickly assess where the brand might be straying from the intended look and feel. The company can also send out a questionnaire to key staff throughout the company to assess how they use the brand. This survey can also reveal other issues employees may have about the brand that the planning stages did not uncover.

To increase your success in terms of global brand compliance, it is important that... key messages, value propositions, and corporate signoffs are available through a central repository.

The second tier is **Appointing a Brand Champion**. This person should be a key staff member who is accessible by all departments and who will encourage proper use of the company brand. If this person is properly trained and empowered, he or she will work continually with other departments to ensure that they are complying with the brand standards manual and are consistently getting the key messages to the audiences. In addition, the champion can investigate how the image and brand are being used in front of customers via reports, folders, and presentations.

Making Brand Materials Easily Accessible is the third tier. In conjunction with establishing a brand standards manual, examine how the branded materials and templates are being accessed by your customers. To increase your success in terms of global brand compliance, it is important that both commonly used presentation tools and written content containing key messages, value propositions, and corporate signoffs are available through a central repository. For instance, document templates can be placed on an intranet where they can be easily updated and accessed regardless of subsidiary or regional office location. Corporate-approved, branded presentation tools can be warehoused in one location and ordered online through a custom Website.

Finally, **Ensuring Consistency** is crucial. Look at what policies and procedures exist for using the brand in various contexts and ensure that all employees have access to company brand policies. Convey to all employees that the continual and consistent use of the brand is critical to the company's success. Use the brand the same way across all media to ensure that customers and employees perceive the company in a way that aligns with the branding message (McManus, 2006).

In the GBC/APMP survey, respondents had an opportunity to offer solutions to branding disconnects they encountered. Their suggestions included:

- Developing a brand strategy that is aligned with the company's vision, mission, and strategic goals
- Constructing a clear communication channel among sales, business development, and proposal development to ensure consistency
- Appointing a single person dedicated to reviewing all company proposals who makes recommendations to all departments
- Improving communication of the benefits of proper and consistent branding
- Implementing consistent branding across geographic locales (i.e., field sales offices)
- Helping marketing understand the importance of proposals
- Instructing new employees on the importance of branding.

Survey results demonstrate that organizations have successfully addressed recent branding challenges in a number of ways, including developing a brand standards manual.

More than half (57 percent) of respondents who answered that their organizations had no branding disconnects also said they have faced a branding challenge in the recent past. The majority (74 percent) said the challenge was successfully addressed by:

- Developing a brand standards manual (55 percent)
- Establishing a branded material resource center (49 percent)
- Appointing a brand champion (34 percent)
- Setting up brand standards training (24 percent)
- Adopting their parent organization's program (16 percent)
- Implementing a brand compliance audit (15 percent).

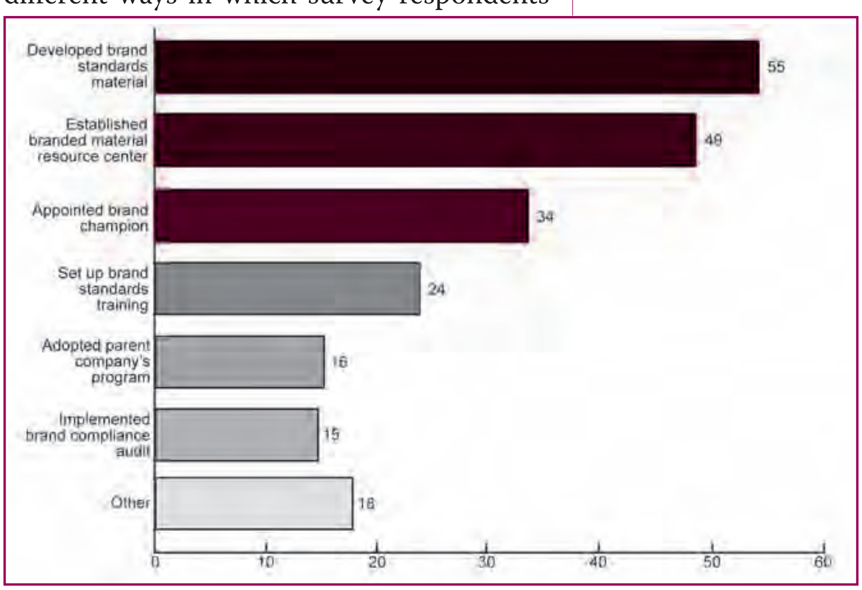
"Marketing is what a company is in business to do," writes branding expert Al Ries. "Marketing is a company's ultimate objective. That's why everyone who works in a corporation should be concerned with marketing and specifically with the laws of branding. If the entire company is the marketing department, then the entire company is the branding department" (Ries et al, 2002).

If the entire company is the branding department, then everyone must be trained and empowered to support the brand. There are different ways in which survey respondents have met this challenge. One respondent reported that company executives met and brought in consultants to develop and implement a branding program. Another said that because his company's growth is primarily by acquisition, branding is always a challenge—administrators meet the challenge by maintaining branding resources on the company Website and sending messages when they see branding violations.

Another respondent said that consistency is paramount. To that end, his company developed templates, trained staff to use them, and distributed awards to personnel who used these templates. A corporate Website with branding guidelines was the solution for another respondent whose company had field/sales offices that did not adhere to consistent branding in their sales communications to customers. Like many organizations, one respondent reported that visual inconsistency was the main challenge. The marketing team, under the direction of the Vice President of Marketing, defined an overall look and applied specific variations of that look to different types of documents, such as magazine articles, seminar materials, and brochures.

Branding in Proposals is in Everyone's Best Interest

Survey results clearly demonstrate the importance of clear, consistent branding messages in proposals. More important, the



How branding challenge was successfully addressed.

results show that proposals are significantly more successful if they are infused with the company's branding message.

Respondents suggested a number of solutions for branding inconsistencies that appear in proposals. Many of the solutions encourage the development of a central company clearinghouse for information on brand standards—such as a Website or brand champion.

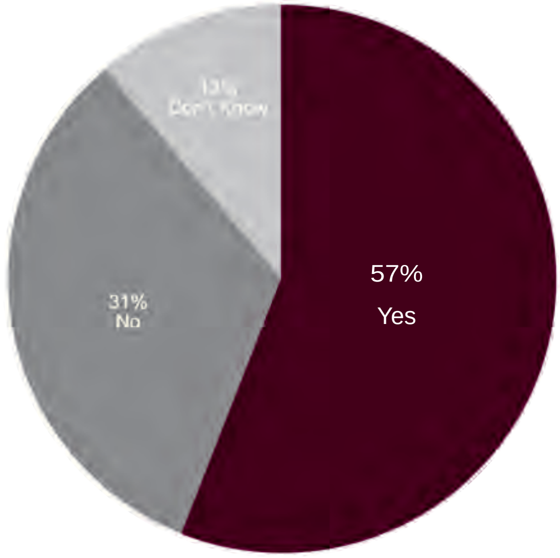
Considering the fact that branding can account for more than 30 percent of the value of a company, protecting the brand by sending a consistent message in presentation materials is critical.

When prospective clients read proposals, they look for the brand to assure them that the company will stand behind the promises it makes in the proposal and that the quality of products and services specified are backed by the brand.

As Scott Ward wrote, a strong brand message tells clients "the buck stops here."

"Overall, because branding is about creating and sustaining trust, it means delivering on promises," Olins summarizes. "The best and most successful brands are completely coherent. Every aspect of what they are and what they do reinforces everything else. Wherever you touch a coherent brand, as a customer, a supplier, a shareholder, an employee, it feels the same. The best brands have a consistency which is built up and sustained by people inside the organization who are immersed in what the brand stands for" (Olins, 2003).

As revealed by the GBC/APMP survey, many companies still have branding work to do on their proposals.



Whether company has had to address a branding challenge in the last few years.

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AND THE SURVEY SAID...
PRIORITIZE
IMPROVE PLANNING; BALANCE WORKLOAD
LEARN TO SAY NO
GET MANAGEMENT SUPPORT
IMPROVE BID DECISION PROCESS
NEGOTIATE DEADLINES

And the Survey Said . . .
Solutions to Everyday Challenges

by Robin Ritchey

I was deciding which of my "urgent" tasks I should tackle next. . .

- *Respond to client question, "The panel has found that the proposed major subcontractor has been non-responsive on another project. What assurances can you provide that they will have a high quality performance on this subcontract?" by finding a replacement small business firm within 24 hours.*
- *Per the Red Team, completely redesign the air pollution section in the Beijing proposal, revise the budget, and submit final drafts by tomorrow.*
- *Finalize slides; do a dry run for orals presentation to GSK this Friday.*
- *The US Department of Education strategic recompete RFP is out two months early!*

…When I get a call from the Copy Center—the color copier has gone down, and I have a multi-million dollar proposal going out tomorrow. And, tonight is Back to School Night at my son's school.

Sound familiar? As I struggle with this scenario, or one like it, for the hundredth time, I wonder how other proposal managers handle these challenges. Surely there must be a better way!

So I decided to ask them. In collaboration with the Association of Proposal Management Professionals (APMP), I conducted a survey and asked APMP members worldwide to give me their best tips for handling the most challenging situations we all face every day—keeping reasonable hours at work; handling stress when you are already overloaded and more proposal assignments just keep rolling in; getting people over whom you have no authority to stick to a tight schedule; creating meaningful career paths; budgeting a winning solution; writing the executive summary first—imagine that!—and developing themes that lead the evaluators to choose you. More than 160 APMP members responded, and you might be surprised by some of their responses.

So, let us examine the results!

> *I would prefer to applaud those who fulfill the demands of a uniquely challenging job and still have a life outside of work.*

What is the best way to keep reasonable hours at work?

I am always intrigued at APMP conferences when we do the "stand up if you have worked 30 days straight on a proposal without sleep" drill. Perhaps I am exaggerating. Seriously though, why is it that we treat this kind of work ethic as a badge of honor? I would prefer to applaud those who fulfill the demands of a uniquely challenging job and still have a life outside of work. Can our profession sustain itself, long term, any other way?

So just how do you keep reasonable hours in our profession?

Your number one answer: ***Prioritize.*** And reprioritize constantly; even many times throughout the day. This response was very helpful. At RTI International, where I work, we assign each approved bid an internal difficulty level, ranging from 0 to 5, based on complexity, strategic importance, and other factors. "For example, strategic, 'must-win' bids are assigned level 0; sole source or add-ons are level 5. This also allows us to quantify the number of high-intensity proposals for management so they can make more informed decisions about allocation of limited resources. It is also an immediate indicator of expected level of effort to proposal managers and other staff, which allows them to better prioritize their workload," says Jennifer Karnitschnig, Manager, Proposal Development Group, RTI International.

My favorite t-shirt is "What Part of NO Don't You Understand???"

Maybe it is because I have three teenage sons, but I have learned to "**just say no**" without guilt or hesitation when it is in everyone's best interest to do so. I recognize this is hard for some of you. A colleague of mine offers this perspective: "Proposal professionals are shared resources, juggling the needs of many different internal customers simultaneously. If you are late with your proposal, that takes my time away from another proposal I have already committed to. You would not want me to do that if the situation were reversed. We will not penalize those who stay on schedule by accommodating, unless there are extenuating circumstances, those who habitually fall behind," says Andrea Turner, Proposal Manager, RTI International.

Most of the areas require a combination of the proven proposal processes to be effective, including solid management support.
–Survey respondent

A paradigm shift can **improve your bid decision process**. Instead of assuming a "bid" decision, which often leads to a less than probing discussion, assume all bid recommendations are "no bid." In order to move forward, the bid champion has to present an excellent case, answering such probing questions as:

- Has the client encouraged us to apply?
- Are funds for the project earmarked?
- Who are our competitors? How will we beat them?
- What are the results of our capture effort to date?

"Management has to buy into the belief that delivering a smaller number of high-quality, targeted proposals for carefully screened opportunities will produce more revenue than 'shot gunning' boilerplate-driven, generic proposals at every solicitation that comes along," said Keith Propst, Georgia Chattahoochee APMP Chapter officer.

Respondents offered two additional suggestions that I found particularly intriguing. Recognizing that it is not practical to staff for peak capacity, you should have "**surge resources**" readily available to augment steady-state resources. At RTI, our editors are cross-trained to also serve as proposal managers. This allows us to immediately double our proposal management resources. We partner with students in the Technical Communications Program at North Carolina State University, who we can contract temporarily to supplement our editor resources. Other surge resources could include using consultants and cross-training junior technical staff to take on certain roles, such as writing corporate capabilities, facilities, staffing or past performance chapters, or customizing resumes. A word of caution: one approach that has been less than successful at RTI is using temporary staffing agencies. We have found it difficult to find sufficiently experienced resources through that approach.

A second idea I really liked is to incorporate a **planned "recovery time"** annually. For example, set aside two weeks in early November, our downtime, and intentionally minimize bids. Instead of juggling proposals, take time to critically assess how we are doing, identify priority areas for continuous improvement, and agree on a plan of action. An annual planning retreat would fit nicely during this time.

Survey said . . .	
Prioritize	45
Improve pipeline planning so workload is better balanced	32
Learn to say no	20
Get management support	18
Improve bid decision process so there are fewer bids	17
Negotiate deadlines	9

"In the commercial world, while there may not be a defined "downtime" in customer purchasing cycles, it is important to schedule a mental health day or two for the proposal center team members following the completion of a particularly difficult proposal." –Keith Propst

Name your best tip to handle stress when your workload is especially high

This is another situation where your ability to prioritize and organize is key.

To ensure that you do in fact take a break each day, recruit a group of your colleagues, set a recurring reminder, and go for a quick walk each afternoon.

"Use humor to defuse tense moments. Remember the old adage, 'You can catch more flies with honey than you can with vinegar,'" says Keith Propst.

Other suggestions include leaving work at work (that includes your laptop!). I am not sure if these ideas were meant in jest, but you might give them a try:

- Walk the dog
- Put on Jimmy Buffet and dance!

Survey said . . .	
Prioritize (and organize)	41
Take a break	30
Exercise	29
Ask for help	27
Renegotiate your workload	14
Laugh; find humor in daily life	4
Vent to someone	4
Eat healthy	2

What is your best advice for overcoming the challenge of being accountable for on–time delivery of the proposal without having authority over technical and other staff?

Ever struggled with this one? The overwhelming answer was to **develop strong interpersonal skills**. That includes treating technical staff as your customers, changing your style to complement theirs, and keeping communication open.

At the beginning of each school year I request a conference with my son's teachers. I want to meet them in person, and tell them how much I respect and appreciate what they do. I do not want to meet them for the first time when there is a problem. Similarly, in this day of high technology, good ole door time—meeting the proposal team members face to face—can be invaluable to building a strong working relationship.

Closely related is **practicing strong matrix management skills**. Ensure that all contributors feel like they are part of the bid team and are invested in the outcome. Invite everyone to the kickoff meeting. Always address the team as "we" or "us." Use a group email distribution list to keep everyone informed of key issues and developments. I use this same list to thank each team member, including our Red Team reviewers and copy shop staff, for their personal contribution when the proposal has been delivered and again when we win the bid.

David Sotolongo, Vice President Program Development Office, RTI International and APMP board member, gives excellent advice for building management support. "You need to accept that change takes time. Lay out where you are now and where you want to be. Then identify incremental steps you can take to get from here to there. It is very unlikely you will be able to sell management on the whole enchilada at one time. Go after the low-hanging fruit first—improvements that will be readily accepted, are easy to implement, and will give you quick successes. For example, if your organization has forfeited business because the proposal was not delivered on time, suggest a plan to put proposals in the client's hands 24 hours before the deadline, and pilot it on a small subset of your proposals."

You mean you can impose consequences on technical staff? Work with management to ensure their performance on proposals is incorporated into their performance review. Identify specific technical staff who, although impressive, should never lead a proposal effort again. Then work with management to assign the lead role to a colleague or assign a deputy technical lead responsible for keeping the process moving forward.

Perhaps most importantly, coach and train technical staff on the importance of applying best practices throughout the proposal process. Just as technical staff is expert in their respective fields, proposal professionals (who at RTI process more than 1,000 proposals every year) are expert at what they do. Be sure they know that you actively participate in APMP, your field's professional association, and, if applicable, that proposal staff hold advanced degrees. By demonstrating the value you add to the process, you will solidify your partnership, and they will respect your recommendations.

Survey said . . .	
Develop strong interpersonal skills	63
Get management support	39
Have a backup plan	17
Practice strong matrix management	16
Impose consequences	9

Name the most effective way to create career–path options for proposal professionals

As opposed to sales and technical staff, proposal managers are generally a small, highly specialized group, which can limit career-path options.

On the other hand, proposal management often gives you unique insight into the mission and capabilities of your company. How can you leverage that perspective into a career opportunity?

In addition to the most cited answers (see survey results), respondents offered these suggestions:

- Upgrade your skills
- Take on temporary assignments in other groups, create or accept special assignments or initiatives, and be active in local and national APMP activities in order to expand your personal network, both inside and outside your company
- Use the APMP accreditation program
- Perhaps most important, take responsibility for your own career path; only you can make it happen!

Survey said . . .	
Make it a management priority	55
Document career plans	36
Establish a formal mentoring program	29
Create new positions by growing the organization	26

Use humor to defuse tense moments. Remember the old adage, "You can catch more flies with honey than you can with vinegar."
–Keith Propst

Name the best tactic to budget a solution that will be competitive

"The key to budgeting a competitive, winning solution is to start early," says Andrea Staffhorst, Manager, Financial Analysis Organization, RTI International. "During the capture stage, conduct a client price-sensitivity analysis and a comprehensive competitive analysis. Present findings at an early Green Team review long before the RFP is released."

Be sure you understand the details, especially when bidding on work that is new to your firm. For example, we found out that money we send to subcontractors in Chernobyl is taxable, which had a significant impact on our negotiations and budget.

"Saying we lost on price is sometimes an easy out. It's almost as if it can't be helped in that situation—like we had no responsibility for the loss," says Staffhorst. David Pugh and Terry Bacon put it nicely in their book, *Powerful Proposals*[1]: "Excellent technical capability poorly communicated is a surefire way to lose on price. When that happens, you don't really lose on price. You lose on communication."

Survey said . . .	
Set pricing strategy early	73
Conduct competitive analysis	31
Ensure good green team review of budget early on	20
Document cost assumptions	13
Budget before you write	12

What is the best way to get technical staff to write the executive summary first rather than last?

Respondents had a field day with this one. Some of the lighter responses were "Good luck," "You can get them to do that?!," and my personal favorite, "***thumbscrews!***"

Seriously though, why is it so important to write the executive summary early in the process? To quote Pugh and Bacon, "Today the executive summary is typically seen as the single most important part of a proposal." "If you haven't mastered the . . . executive summary, then you aren't competing at the high end, and you are losing business to companies that have mastered this art."

The most effective executive summaries are aimed at two very different audiences. There is the external audience, or the client, but there is also the internal audience, the proposal authors. When the executive summary is written first, it drives the writing of every section of the proposal. When it is written last, you have lost half its value.

By writing it early, you allow for an iterative process of many drafts, including excellent graphics. If you write it last, this most important part of your proposal will get short shrift. Not a good place to be.

So HOW do you get your proposal team to write the executive summary early?

"Try a collaborative effort for writing the executive summary early. The proposal manager can 'interview' the sales team to get them talking about the win strategy. Take notes and let the best writer—usually the proposal manager—take a shot at drafting the executive summary. It does not have to be perfect, just a decent snapshot of the key ideas that can be polished over the entire course of proposal development," according to Keith Propst.

Survey said . . .	
Require draft for kickoff meeting	38
Keep library of examples, templates	22
Require draft for Pink Team	20
Write draft before RFP is released	15
Put milestone on proposal calendar	10
Emphasize that a comprehensive capture effort includes a draft of executive summary	5
Sales staff writes first draft, including key sales messages	5

Offer your best ideas to develop compelling win themes or discriminators

Respondents felt the same way about win themes—write them early in the process.

A win theme (Pugh and Bacon):

- Highlights your strengths
- Ghosts (i.e., subtly points out) your competitor's weaknesses
- Mitigates your weaknesses
- Neutralizes your competitor's strengths.

Most important, win themes focus on the client. "Customers don't buy what it is; they buy what it *does* for them. They buy benefits, not features," say Pugh and Bacon.

1 Excerpts of Power Proposals used with permission by Lore International Institute, Durango, CO, 800-866-5548.

I like to apply what I call the "3 Cs" test

Is it Clear?

Have someone who is not involved with this proposal read it—perhaps your spouse or a friend. If they do not immediately understand what you are saying, continue to refine.

Is it Concise?

Win themes need to be crisp and hard-hitting. Good editors are key here.

Is it Compelling?

Is it believable? Does it make it clear to the evaluator why they should choose you, and not the competition?

Summary

In closing, the survey brought in to focus some essential tips for effective proposal management:

- Start early, including a facilitated brainstorming meeting to develop compelling win themes, and a capture green team to set pricing strategy early
- Prioritize and reprioritize
- Develop strong interpersonal skills
- Work with management to build their support
- Require a draft executive summary for the kickoff meeting.

When you feel particularly challenged:

- Keep an open mind; consider all alternatives
- Ask for help and/or advice.

Participation in APMP events, such as national and regional conferences, is essential. It allows me to learn from the best in the field, YOU, and continually add to my personal body of knowledge. I am looking forward to my next "urgent, must do now" challenge so I can use these new ideas—well, maybe not looking forward to, but I am ready. ***Bring it on!***

Survey said . . .	
Schedule a facilitated brainstorming meeting (early)	89
Require features/benefits chart in draft executive summary (early)	26
Keep library of examples, templates	21
Train technical staff	6
Know client, especially hot buttons	3
Review at Pink Team	0

Good

Our team brings 233 years' collective experience to your project.

Better

Our team's 233 years' collective experience provides proactive problem-solving, a diminished learning curve, and proven methodologies.

Best

Our team's 233 years' collective, relevant experience provides EPA with proactive problem solving, a diminished learning curve, proven methodologies, and the lowest possible risk of budget and schedule creep.–adapted from Pugh and Bacon

Robin Ritchey has supported business development efforts in commercial and non-profit firms—from AT&T to her own education consulting business—for more than 25 years. As co-proposal leader, she won the largest federal government telecommunications procurement ever, valued at $2.4B. At RTI, International, Robin assists hundreds of research scientists in their quest to fund research projects worldwide in education, bioterrorism, health, survey, and the environment. A veteran presenter, Robin's sessions are fast-paced, highly applicable, and FUN! She has presented at Southern Proposal Accents Conference (SPAC), 2006, APMP Annual Conference, 2007, and presented *And the Win Theme is . . .* at SPAC 2007, October 11, in Raleigh, NC.

Certificate
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I know what you mean, Blair. Trust is a tough thing to come by. I tell you what. Why don"t you just trust in the Lord. Watch Clark. What? I said watch Clark and watch him close, do you hear we? This License permits the licensee to use the software listed on this agreement, providing all terms and conditions listed below are met for the duration of the software use. One License is issued per copy of software purchased. Using of said software signifies agreement with the terms and conditions listed below. All conditions must be met, otherwise I don't know what we can do about it. I guess what we have to do is just trust you. I know what you mean, Blair. Trust is a tough thing to come by. I tell you what. Why don"t you just trust in the Lord. Watch Clark. What? I said watch Clark and watch him close, do you hear we?

It Takes a Village

Or Why The APMP's Professional Accreditation Program Is Important To Our Profession

by Holly T. Andrews, PPF.APMP

You have met them before, those people who hold certificates that show they have mastered something. They may be CPAs, PEs, PMPs, CAPs, MCPs, CPCs, CPHQs, or CFPs. There is a professional certification for a wide variety of professions. Perhaps you have used professional certification as a way to reduce the field of candidates qualified to provide good financial advice, home remodeling, career counseling, or a network designed and built for your company. All these needs can be addressed by people who have earned a professional certification, and you might consider that certification as a qualifier.*

[1]Certified Public Accountant, Professional Engineer, Project Manager Professional, Certified Administration Professional, Microsoft Certified Professional, Certified Construction Professional, Certified Professional in Healthcare Quality, and Certified Financial Planner.

There are good reasons to have professional certifications. You start with a knowledgeable body or organization that collectively identifies what it takes to be the best in a profession. These organizations set standards of best practice. They give people in the profession, or those interested in the profession, an opportunity to learn what the best practices are and, in many cases, to show proficiency in them. They test people to determine if they have learned and understand the best practices. If the candidate meets all of the criteria, they grant a professional certification. Those who pursue professional certifications show that they have an intense interest in their field of endeavor; want to learn how best to pursue their profession; and want to show others they have taken the time to study, practice, and master it.

I do not know of any professional certification that is easy to earn. I suppose if any one was easy and anyone could get it, no one would respect it. Because getting professionally certified is not a simple task, you stand out once you have earned a professional certification, and rightfully so.

I do not know of any professional certification that is easy to earn. I suppose if any one was easy and anyone could get it, no one would respect it.

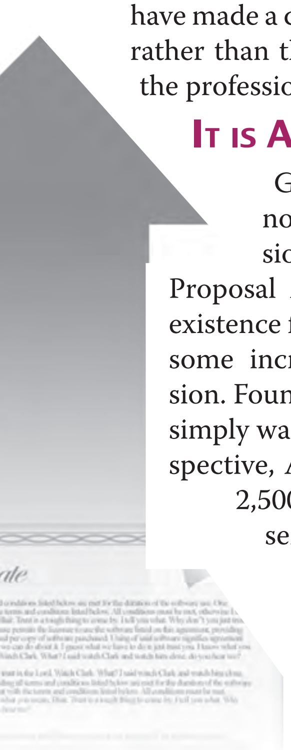
Consider certification from the perspective of the person who has earned it. That person has put in the time to learn standards and best practices. They have studied, analyzed, memorized, practiced, taught, advocated, and promoted best practices. They have taken exams, written about their successes, documented their training, and tracked their progress. They have looked into the future and set goals for themselves, including getting the continuing education critical to ensuring their certification remains valid. They have met the demands of seeking certification head on, emerged with an acknowledged and recognized achievement, and are proud of their accomplishment!

Now look at certification from the perspective of purchasers/companies/employers who want to buy a product or service. They want to have some assurance that what they are buying is a good value. The Good Housekeeping Seal of Approval, ConsumerLab, and Better Business Bureau—we look for these stamps

of approval or some other method of vetting that helps us feel confident about what we are going to purchase. It is human nature to want the biggest bang for our hard-earned bucks, whether those bucks come from our personal wallet or are spent on behalf of our employer. Therefore, we often limit our search to those products and services that have received an endorsement we understand and respect.

In a number of ways, certifications can help both employees and consultants who are seeking qualified candidates to fill a position. First, the certification provides the level of endorsement that helps employers qualify a candidate and feel they are going to get good value for their hiring/procuring efforts. Second, knowing there is a certification for the field enables the hiring person to narrow the list of candidates by using that certification as either a "must have" or "preferred" qualification. Third, when people seek to become certified in their field of endeavor, they show a further commitment to their career and a desire to stay informed about best practices. This helps potential employers select people they know have made a commitment to their profession, rather than those who might be dabbling in the profession to see if they like it.

> *Our 2,500+ members can share a great deal of information specific to what is being asked of proposal professionals every day, in every industry around the world.*



It is About Time!

Given these considerations, we now focus on APMP's Professional Accreditation Program for Proposal Managers. APMP has been in existence for nearly 20 years and has done some incredible things for our profession. Founded by a handful of people who simply wanted a forum to share their perspective, APMP currently has more than 2,500 members worldwide representing proposal and business development professionals across industry and government. APMP embraces and encourages active collaboration with all areas of the business development field, and provides wonderful opportunities for members to network, learn, and advance our knowledge of best proposal practices.

However, despite huge advances in our membership and body of knowledge, until recently we have been missing an important element that many other professional organizations provide their members—professional certification. That element—the APMP Professional Accreditation Program—is now fully established, following years of preparation, discussion, and a major push by one APMP member who was one of its staunchest supporters.

Along the way, much research was conducted on other accreditation programs to identify protocols, qualifications, post-certification requirements, enforcement, costs, and administration. A committee comprised of international members worked with the United Kingdom Accreditation Service (UKAS), an organization linked into a worldwide network of accreditation bodies, to provide guidance on how to ensure APMP's program complied with international standards. We hired APM Group to administer the program. We solicited valuable input from the Business Development Institute International (BDI) to ensure that we stayed aligned with their overall business development framework. We crafted exam questions that were vetted by members of the APMP Board of Directors. We identified resources, designed levels of certification, established protocols, and had the entire program qualified and passed by UKAS.

Three years ago at the APMP Conference in Phoenix, we made the big announcement that the APMP Professional Accreditation Program was established. Since then, people from more than 70 companies have started the program, nearly 25 percent of our membership is accredited at the Foundation level and each month an average of 30 people achieve one of the program's levels of accreditation.

It is Our Village!

Why does it take a village for this Accreditation Program? Those who are involved in proposal management in any capacity know how changes can create or impact best practices. A new federal regulation, a different expectation within an industry, or a technology can change how we do business. By sharing our experiences while coping with change, we can develop and enhance best practices. Who knows better than we do about what is going on in our profession? Our 2,500+ members can share a great deal of information specific to what is being asked of proposal professionals every day, in every industry around the world.

Understanding best practices saves time when bringing a new employee or consultant on a proposal team because we share a common language regarding those practices. The message is consistent no matter who manages the new person or conducts their training. When we move on to other opportunities, we bring our best practices knowledge with us.

The best practices stressed in the APMP Professional Accreditation Program are based on years of collective professional experience.

As proposal professionals, we are our own village. By helping each other grow and develop, we strengthen our profession. By setting and following shared best practices, we show that our profession is not simply an administrative endeavor charged with merely making a proposal look attractive. We are a family, with all members sharing experiences, maintaining high standards, and applying commonly held best practices. Having APMP and the Professional Accreditation Program behind us helps convince our employers that they can trust us to produce effective, winning proposals.

So, Why Should You Become Certified?

Both the key to and the challenge of the Professional Accreditation Program is knowing the best practices endorsed by APMP. This may sound simple, but it really is not. What works for some of us, and has worked well for years, may not actually be best practices. However, if we knew about other best practices endorsed by APMP, we could produce even better proposals. The best practices stressed in the APMP Professional Accreditation Program are based on years of collective professional experience. They ensure each certified professional can make informed decisions on how to manage any proposal and lead any proposal team.

Knowing such commonly held best practices helps us consistently apply high levels of proposal practice. If someone joins your proposal team (an engineer, a subject matter expert) who has used best practices under other proposal managers and wonders why you do some things differently, you can explain and justify your approaches. The key here is that you have chosen to do something in a particular, proven way, and based that choice on your profession's knowledge and experience. It helps you maintain credibility.

Having an understanding of APMP's best practices gives you a shared background and common language, and earning your professional certification gives you a recognized credential. It is a bit like having 10 years' experience and a degree vs. having 10 years' experience without a degree. You may have the know-how, but with the Professional Certification you will also have the edge.

Embracing the Professional Accreditation Program also helps employers recognize their employees and provide them with a career path. The program is designed to provide guidelines that help employees with little proposal management experience grow and advance to the next level of certification. The resulting career path helps our organizations develop proposal managers and recognize their achievements.

We are maturing from an organization of individuals who just happened into the job to a profession filled with people who recognize proposal management as a career they want to pursue. APMP's Professional Accreditation Program will strengthen and speed our maturation process. Through it, our village will grow larger and stronger.

Setting the Standard Everywhere

If you are an APMP member, chances are you are not just dabbling in proposal management. You may be new to the profession or a seasoned veteran, but you are committed to proposal management as a career. As such, you join our village as a professional in a real and growing profession.

We are proud of what we do and what our profession is about. Having standards based on best practices helps us do our work better, both initially and throughout our professional careers. Our Accreditation Program will continue to develop and improve as we identify better ways to do our business. The more we evolve and embrace best practices, the stronger our profession will become and the higher it will be held in esteem.

What Are You Waiting For?

It is easy to get started. Just go to www.apmp.org, click on “Education and Initiatives” in the top navigation bar, and then click on “APMP Accreditation” in the navigation bar to the left. You will find everything you ever wanted to know about the Professional Accreditation Program. Still have questions? Contact Cathy Day in the UK at accreditation@apmp.org or at +44 (7711) 507396, or Holly Andrews in the US at 619-548-7881. We are both passionate about this program and would be delighted to talk to you about it, share our experiences, give advice, and answer your questions.

It is easy to get started. Just go to www.apmp.org, click on “Education and Initiatives” in the top navigation bar, then click on “APMP Accreditation” in the navigation bar to the left.

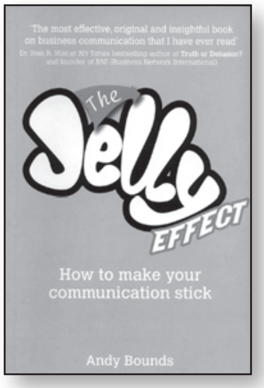
Authorized Training Organizations

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

Shipley StrategicProposal wpm group shipleyassociates

Holly T. Andrews has more than 20 years' experience in project, proposal, and human resource management; business process analysis; and technical writing. She owns her own company, T3W Business Solutions, providing Geographic Information System (GIS) development, proposal management and writing, process analysis and flowcharting, technical writing, and policy and procedure development. She has more than 13 years' experience managing and writing proposals and was the Director of Proposal Operations for Motorola Corporation and Anteon Corporation (now General Dynamics), handling federal, state, and local government bids for both products and services. She has written a number of proposal libraries for a wide range of commercial clients. Ms. Andrews served three years on the Board of Directors of APMP National. She holds a BS in Business Management, a Masters in Business Administration, and a Certificate in Human Resources Management; is a Certified Professional in Proposal Management, and is a candidate Certified Appraiser of the Business Development Capability Maturity Model for the Business Development Institute International.

Book Review



The Jelly Effect: How to Make Your Communications Stick, by Andy Bounds

$24.95   www.andybounds.com

by Ali Paskun, AM.APMP

Too much information devoid of relevance is a problem that affects practically all business communication today. In his unique, humorous, and insightful presentation style, Andy Bounds points out in *The Jelly Effect*, "Why doesn't business communication work? Why can't people keep their audiences listening to them? Because of one simple reason: Business people say too much irrelevant stuff all the time, every day, to every type of person." This is what he defines as the jelly effect: "When you speak like this, it's very much like filling a bucket with jelly, and flinging it at the other person, hoping some of it will stick."

But how can business communicators more effectively deliver their messages? In his latest book, Bounds provides some answers to this question. He covers topics such as how to network effectively, sell more, give and receive business referrals, and give presentations that get the results you want. He offers easy-to-use tips, hints, and techniques to improve communication. Each one, as he points out, is designed to be "new, simple, relevant, accessible and effective."

Each one is also easy to implement, so it will not take any time at all to see results from your improved approaches to communication. For example, Bounds presents "The Golden Rule of Selling": "When the customer says 'yes,' SHUT UP!" Continuing with your sales pitch after the customer has already agreed to buy from you ends up boring the prospective buyer; stopping, in Bounds' words, "…is totally jelly-free."

Another bonus of this book is that each chapter is written as a self-contained tutorial on a particular subject. In this way, the reader has the option of reading the entire book cover to cover or selecting a topic of particular interest. For instance, if you are planning to attend your first APMP chapter meeting and need a boost of confidence in approaching colleagues, then the chapter that discusses networking would be most beneficial for you. There you will find tips on how to introduce yourself to an individual or a group, exit the conversation gracefully, and make contacts with colleagues that are mutually beneficial. For example, he explains the five steps of a networking conversation:

- Getting into the conversation
- Talking about them
- Talking about you
- Chatting
- Getting out of the conversation.

The chapter on referrals compares getting a referral from a satisfied customer to asking someone out on a date—a rather interesting analogy!

Each chapter begins with a flow diagram illustrating the main points of the chapter. This visual approach helps readers find the specific information they are looking for on any topic. The book also includes many exercises, quizzes, and stories from Bounds' personal experiences, which help readers apply his techniques to a specific situation or personal need.

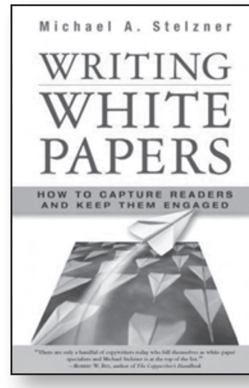
The Jelly Effect is an excellent companion piece to *Win That Pitch!*, Bounds' first publication. It is an excellent resource for business communicators at all levels. Proposal professionals seeking to attain Practitioner or Professional Accreditation through the APMP will also benefit from Bounds' advice on communication that is persuasive, relevant, informative, and to the point.

**The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Managing Editor John Elder at jelder@caci.com.*

Book Review

Writing White Papers: How to Capture Readers and Keep Them Engaged, by Michael A. Stelzner

WhitePaperSource Publishing, 2007 Hardcover $34.95 ebook $25; See www.whitepapersource.com for other options



by Betsy Blakney, AM.APMP

If you have ever been challenged with writing a white paper, asked to review one to make suggestions for improvement, or tasked with formatting one that was already written, then Michael Stelzner's book will be a welcomed addition to your professional library.

Packed with practical, step-by-step instructions, Stelzner's book is the definitive guide to researching, planning, writing, and editing white papers. From describing the evolution of white papers and their use as a marketing tool, to providing the reader with a primer on best practices, this "how-to" book provides everything you need to develop and deliver a compelling white paper.

> *"If you give readers something of value, they will give you their loyalty, and ultimately their business." – Stelzner*

Stelzner's axiom states: "If you give readers something of value, they will give you their loyalty, and ultimately their business." He contends that mastering the art of writing white papers is a necessary skill in a business professional's arsenal to lure and persuade. Sound familiar?

As I read through this comprehensive guide, I followed a road map full of tips, strategies, and best practices. Each chapter builds on the next, ensuring you understand what white papers are, appreciate their value, and know how they are used. It also walks you through a 10-step process for writing a white paper. Like a well-tested recipe, the book likens a good white paper to a tasty salad having the right combination of greens, vegetables, meat, and spices. Similarly, a well-written white paper contains a balance of different ingredients that appeal to the reader's tastes.

From interviewing techniques to tried and true research practices, the book helps you build a knowledge base and sets you well on your way to putting pen to paper. Tips on what to avoid and how to prepare to sit down and write are included with clear, practical examples. After following a simple four-step First Page Formula, you can begin crafting your first page.

Getting started is difficult for many writers. By following the First Page Formula provided by Stelzner to develop the opening paragraphs of your white paper, you ensure that your topic is relevant and focused on the readers' needs. The First Page Formula consists of the following:

Step and Element	*Purpose*
1 Identify the reader	Identifies who benefits from the document
2 Summarize the challenges	Explaining key problems builds a connection with readers by highlighting issues they are concerned about
3 Summarize the solution	Helps readers know what to expect in the document
4 State the goal	Helps readers understand what they will learn by reading the white paper

Just as important as knowing what to include as an opening is knowing what to avoid on the first page. Stelzner recommends steering clear of the following:

- Detailed explanations of the solution—use the opening to teach rather than sell; readers might not be fully aware of what they want at this stage
- A discussion of features—discuss benefits in the introduction, not features
- An introduction to your company—build a connection with readers first, rather than selling the company

- Describing how the solution works—focus on establishing the need first
- Humor—avoid humor, as it gets in the way of the core message.

The book's nuts and bolts focus on creating compelling titles and writing the paper's core. They provide techniques to help you strengthen your writing, and stress the value of formatting your white paper for the best presentation. Here I received affirmation of similar proposal writing techniques I use when training: translating features into benefits, using quotes to strengthen your paper, overcoming writer's block, and using an editor.

Marketing specialists will find the chapter dedicated to this subject full of options for marketing your white paper. Stelzner applies his experience to provide a number of successful tactics. The section on "Developing Brand Equity with Registrations" aptly describes the strategy used to capture leads via Website registration to receive an abstract of a white paper. I generally do not mind providing personal data when doing this if I think my privacy will be protected and feel I will receive value from the forthcoming white paper.

Effectively writing white papers increases your chances of reaching decision makers, gaining credibility, demonstrating thought leadership in your industry, and winning more business.

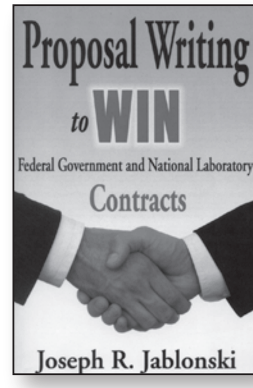
If you are still not convinced that you should add this reference to your bookshelf, let me further justify your purchase by pointing you directly to the appendices. The helpful information here is rationale enough. Appendix I is a Quick Start Guide for those with limited time on their hands. Appendix II offers samples of two persuasive white papers, and Appendix III is an invaluable listing of resources that will save you the time which might otherwise be wasted searching in bookstores for white paper sourcebooks you will never find.

Effectively writing white papers increases your chances of reaching decision makers, gaining credibility, demonstrating thought leadership in your industry, and winning more business. That is why Stelzner wrote the book in the first place. It is a great investment and will improve not only your white papers, but all the writing you do.

Book Review

Proposal Writing to WIN Federal Government and National Laboratory Contracts, by Joseph R. Jablonski

Technical Management Consortium, Inc., 2007 $40.00



by Ali Paskun, AM.APMP

"Writing proposals can be exciting!" So says Jablonski in the Preface to this excellent resource that covers all aspects of pursuing Government contracts. At first, I did not think I would put writing proposals on the top of my list of exciting things to do. However, I have to admit that winning a major bid after working a month (or two…or three) of seven-day work weeks can be pretty exhilarating—even downright exciting! That is exactly the point of Jablonski's book. It is not just about writing a proposal; it is about writing the proposal that WINS.

In my opinion, the heart of the book is Jablonski's Five-Phase Approach™ to Business Development, which describes:

1. How the Government develops requirements that become a solicitation
2. How you market and pre-position yourself to bid
3. The 17 steps to writing a winning proposal
4. How your proposal is evaluated by the Government
5. Negotiating with the Government, contract award, and receiving your proposal debrief.

The book is divided into two categories that describe what occurs while the Government is developing a solicitation and what happens after you submit a proposal. Gaining an understanding of the Government's process will help you gather better intelligence about a potential bid opportunity and potentially influence the solicitation before it is released.

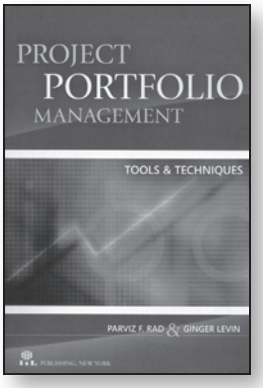
Jablonski covers many topics you would expect to find including identifying opportunities, performance-based contracting, contract negotiations, and proposal debriefs. What sets this book apart from others about the capture management lifecycle is how he breaks each part of the process down to its basic elements and makes them easy to understand. For instance, in Chapter 8: Proposal Development (Phase 2), he discusses each section of a Government RFP. He then takes that discussion one step further by offering an "Interpretation" at the end of each RFP section that clearly explains (in English not government-speak) the information contained in that section, how it fits into the bidder's proposal, and what the bidder needs to consider to ensure compliance. This is just one of many ways Jablonski simplifies what can be a confusing and frustrating process. Another unique aspect of this book is Jablonski's insights into pursuing contracts at the national laboratories—a part of the federal market not often discussed.

That is not to say the subtitle of this book should be *Proposals for Dummies.* True, the information is easy to read and understand, which will help small businesses and those new to submitting proposals to win contracts. It is not, however, so basic that a proposal professional with many years' experience will not find some new tips and techniques that could increase the chances of writing a winning proposal.

There are only two things I would change: the text needs a substantive edit to ensure consistency of usage standards, and more discussion is needed regarding the oft-passed over topic of proposal production. Considering the many tips and techniques contained within its pages, however, the book does not suffer by lacking these things.

All proposal professionals, regardless of their skill level, will benefit from Jablonski's tutelage. Those pursuing accreditation at any level through APMP will find a wealth of tools here that will aid them in attaining that goal. This book encompasses the entire capture cycle and is a valuable resource.

Book Review



Project Portfolio Management Tools & Techniques, by Parviz F. Rad and Ginger Levin

International Institute for Learning, Inc.–2006

by Ali Paskun, AM.APMP

At one time, projects were managed independently of each other and were rarely assessed in total by executive management. Today, however, management needs to review all projects quickly to ensure they meet the organization's strategic goals.

A project portfolio management system is a tool used by executive management to select which project(s) to invest in. It brings realism to an organization's planning processes and a rational way to determine the best allocation of personnel and financial resources. Grouping projects so they can be managed as a portfolio allows executives to see the overall picture as it relates to projects. This helps them recognize redundancies, apply necessary resources appropriately, and track progress.

This book is for those executives and other project professionals who strive to have a formalized system of authorizing the right projects and abandoning the wrong projects.

This book by Rad and Levin is promoted as a resource that "is written to demonstrate how to elevate your organization's project management thinking to the level beyond managing individual projects in a standalone fashion. This book is for those executives and other project professionals who strive to have a formalized system of authorizing the right projects and abandoning the wrong projects, who desire to spend resources in the most efficient manner, and who want to have an actionable strategic plan for improving organizational project management sophistication."

The book's four chapters include such topics as an introduction to project portfolio management and discuss the enterprise project management office, project portfolio management deployment guidelines, and a comprehensive project portfolio model. The many appendices review project portfolio management literature and provide templates and checklists, including the duties and competencies of the portfolio manager, a work breakdown structure for the project portfolio management system, and a project portfolio management implementation checklist. Considering the widespread use of electronic media today, I was surprised that these templates and checklists were not provided on a CD-ROM to make them immediately available.

The book should be a quick read, something that would be appreciated by any manager in today's busy, hectic work environment. However, the dry, academic textbook-style in which it is written does not make it an easy read. There are also several graphics that seem to have been squeezed into the text. In a number of instances, the font size in the figures was so small that I found some of the information almost unreadable. However, there is valuable information contained in the book that can help project managers establish or mature a project portfolio management system.

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

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

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

Charlie Divine
Barry Fields
Dennis Green
Steve Jensen
Jayme Sokolow

2004 Recipients Presented June 2, 2004, Hollywood, Florida

Art Bass
Richard “Dick” Eassom
Michael Humm
Nancy Kessler

2005 Recipients Presented June 8, 2005, Phoenix, Arizona

Mark Ciamarra
Dana Spears

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

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

2007 Recipients Presented May 29, 2007, Savannah, Georgia

Holly Andrews
Dr. Bob Goldstein
BJ Lownie
Jessica Morgenstern
Larry Newman
Kelli Stephenson
David Winton


WORK
"The Workaholic"
The Art of Bids & Proposals

The *Art* of Bids and Proposals

by Ray Brown

Seminars, exhibitions, and conferences provide fantastic forums at which to meet friends, colleagues, peers, and sometimes the opposition—new and old alike. They are also places to find out about new ideas, practices, experiences, tools, tips, and applications that can make our lives as proposal professionals easier and improve the proposals we write.

For these events to have the maximum impact and deliver best value, the attendees must be prepared to take advantage of all opportunities offered. There are nuggets of gold throughout an entire event—blink and you will miss one!

QND employees have attended the APMP conference for three years and, of course, we have a vested interest—we want people to focus on getting the maximum benefits from the conference and exhibitions because we want to talk to them about our own offerings.

"The trouble is that most people arrive 'unready'."

The trouble is that most people arrive "unready." They have probably just finished a massive project, are tired from travelling, and are more focused on the pile of emails that will be waiting for them when they get back to work than on the event itself.

So we thought it would be a good idea to get people in the right frame of mind as early as possible. The challenge—how to interrupt/distract attendees from their train of thought and get them focused on the conference and all it has to offer. We thought about several ways of doing this, but felt that whatever "it" was, it needed to be different, funny (humor is always a great ice-breaker), and relevant to the topic of the conference.

We eventually came up with the idea of a sketching competition. We called it "The Art of Bids and Proposals." The idea was to give attendees some crayons or pencils and a postcard-sized entry form, and ask them to sketch anything that came to mind regarding bids and proposals. It could be funny or serious, a commentary, or just an observation.

The results were great—although quite a few people were a bit reticent about sharing their drawing talent with the rest of us (they clearly did not know how bad I am at it!). In general, the attendees were happy to give it a go. We had efforts of all sorts—from outline sketches to complex, detailed drawings and all points in between. It was fascinating to see how people regard and view their own industry.

The winning sketch was from Chris Rademeyer, who works for Deloitte in South Africa. A long way to come for the conference, but clearly winning this competition made it all worthwhile!

We have published some of the drawings in a gallery on our Website, www.qnd-limited.com, so please visit it and see what you think. If you have any comments or observations, please share them with us, and maybe we will start a visitor's book! If you would like to have a go yourself, let us know and we will send you the sketchpad.

We intend to carry this on—we repeated the exercise at this year's UK APMP conference at Bournemouth in October and, we hope, to also repeat it at next year's annual conference in Palm Springs, CA. We look forward to seeing your thoughts and views develop.

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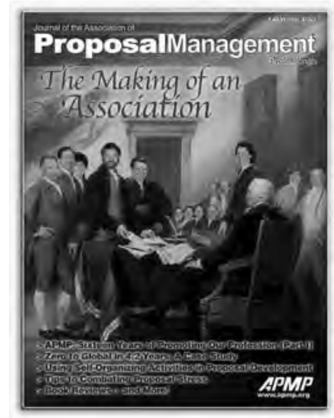

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