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Journal of the Association of ProposalManagement • APMP • Fall/Winter 2008

Cover Art by Chris Prochaska, 24 Hour Company.
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CEO Forum

by Dick Eassom, AF.APMP

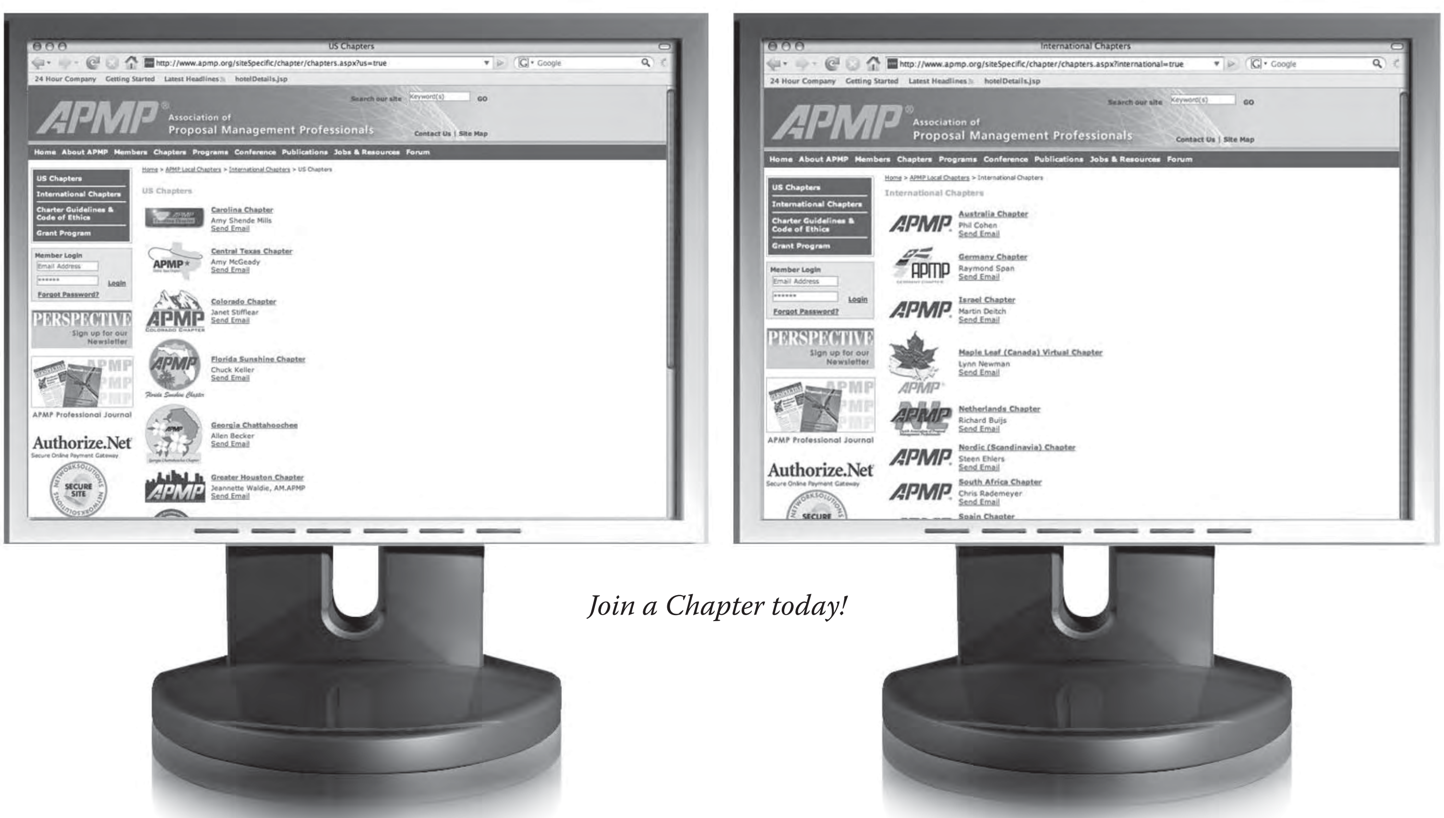
Yet another successful Annual Conference! With more than 600 attendees, our 19th Annual Conference in Rancho Mirage, CA broke the attendance record again. I would like to thank co-chairs Dana Spears and David Winton, and the many others who helped to make this conference such a success.

Your Board of Directors and I were particularly pleased to host an evening meeting with the many Chapter Chairs who were able to attend the annual conference. Since September 2007, we have chartered four new chapters: Florida Sunshine (Virtual); DACH (for members in Germany, Austria, and Switzerland); Central Texas (for members in Austin/San Antonio, TX); and Lone Star (for members in Dallas/Fort Worth, TX).

I firmly believe that strong local area chapters are the lifeblood of our organization.

I firmly believe that strong local area chapters are the lifeblood of our organization. For many years, our local area chapters received an annual rebate based on rather complicated metrics. This year, we greatly simplified the rebate basis and doubled the rebate to 24 percent of the annual membership per chapter-affiliated member. This will result in a substantial increase in the funds available to our chapters. If you have not affiliated with a local area chapter, you should do so now! (Go to our Website, www.apmp.org, click "Membership," click "Update Member Profile," log in, and set your chapter affiliation—it is as simple as that! You may affiliate with any chapter you wish.)

We have created a grant program to assist our chapters with extraordinary costs



Join a Chapter today!

and to assist members in creating new chapters—especially international chapters where incorporation fees may apply. We are funding this grant program with 24 percent of the membership fees of all our members who are not affiliated with a local area chapter.

Some of you are probably asking, "Well, if only 24 percent of my annual membership fee goes back to the chapters, where does the rest go?" Your membership fee also covers:

In common with other international profesional organizations, we are making it easier for members from around the world to afford dues.

- **Accreditation Support.** More than 700 members are accredited at APMP Foundation-Level™, and this number is increasing. We are pleased to announce the recent appointment of Chuck Keller, APMP Fellow, as our new Accreditation Director. Chuck will be supporting you with all your accreditation activities and providing much needed relief to Cathy Day. As our Chief Examiner, Cathy has been an unsung hero for many years, giving up much of her personal time to support members through the accreditation process. We were extremely pleased to induct Cathy as an APMP Fellow at the Annual Conference.
- **BD-Knowledge Base™ Support.** The BD-Knowledge Base™ is our joint venture with the BD-Institute International, providing a searchable Body of Knowledge on business development and capture and proposal management, and is the premier resource for our accreditation program.
- **Task Forces, Initiatives, and Surveys.** Your Board of Directors carefully considers all proposals for these activities based on their value to you, our members. This year, we will publish the results of our latest salary survey. We also funded the creation of the five "Proposal Guide" podcasts available from our Website and from iTunes, and are planning more podcasts for future release.
- **APMP Website Maintenance and Development.** We have launched forums that allow you to communicate with other members on a wide variety of topics, and allow chapters to communicate with their affiliated members. We are planning a number of database improvements for member data and annual conference planning and registration.
- **APMP *Journal* and APMP *Perspective*.** The printing and mailing of the APMP *Journal* represents a significant part of our costs. Some of you have expressed a desire that our publications reflect your proposal demographic more closely, but remember that most articles come from our members, so please consider contributing if you see a gap!
- **Administration and Management Reserve.** We currently have only one full-time salaried employee and two part-time employees, a minimalist infrastructure for a professional organization. Our management reserve policy ensures that we have the funds for the large deposits required for our annual conferences and for unforeseen circumstances.

In common with other international professional organizations, we are making it easier for members from around the world to afford dues and APMP Foundation-Level™ accreditation in lower-income economies. We have introduced three tiers of membership fees based on the World Bank's groups of countries by income. The new tiers are:

- Tier 1 (e.g., USA, Europe): US $125.00
- Tier 2 (e.g., South Africa): US $112.50
- Tier 3 (e.g., India): US $100.00.

Each year, the incumbent US President delivers a State of the Union address. I want to tell you that the state of our association is good—but it can always be better. At the Chapter Chairs meeting at the annual conference, we discussed some pertinent topics concerning our future.

In my last forum as APMP CEO, I would like to address two of those topics. First, "what kind of organization do we want to be?" As the Association of Proposal Management Professionals, it is clear that we are embracing all those involved in creating competitive business proposals, from proposal managers to proposal coordinators, from small letter proposals to gargantuan government proposals. However, our mission is to "Advance the arts, sciences, and technologies of new business acquisition and to promote the professionalism of those engaged in those pursuits." We always consider our mission to serve those directly involved with proposals, but we also strive to include those involved in capture planning and business development in general. Indeed, we specifically emphasized capture management at our recent annual conference. Are we succeeding with this inclusiveness? Does the name of our association hamper us in this goal?

We would appreciate your thoughts and suggestions on these fundamental and difficult topics.

Our special relationship with the BD-Institute International (BDii) continues to strengthen. We are currently investigating opportunities that may lie within the auspices of the American Society of Association Executives (ASAE) and the Center for Association Leadership. ASAE and The Center serve approximately 10,000 associations that represent more than 287 million people and organizations worldwide, and may provide a mechanism to promote both the BDii and APMP to many more people. Nevertheless, in the long term, what does APMP want to be? Whom do we want to represent?

The second topic that I would like to address is the size of our organization. We currently have nearly 2,900 members worldwide. However, a new member joining today will get a membership number over 9,000. So what happened to the other 6,000+ members? Many have retired, and many have changed jobs. Some may have joined specifically to attend an annual conference and found that we did not address their needs. Some may only remain members while their employer pays their membership fees. There are many, varied reasons why people do not renew their membership. However, fundamentally, after 25 years, should we consider a membership of 2,900 members worldwide a success? Probably not.

I have often stated that I believe there are thousands of people who are involved with creating proposals who do not know about APMP and who would benefit from membership and accreditation. We are very optimistic that our combined approach with BDii to ASAE and The Center for Association Leadership will give us access to many of these potential members through their own professional associations. However, what other strategies do we need to increase our membership? Is a marketing campaign the right approach?

The APMP Board of Directors and the Boards of Directors of our chapters comprise members just like you. We have volunteered our time and energy to promote and manage our association, but we are no smarter than you are. We would appreciate your thoughts and suggestions on these fundamental and difficult topics, and will soon be sending a survey to all members requesting feedback.

I have thoroughly enjoyed my tenure as your Chief Executive Officer, and am looking forward to supporting David Bol, your incoming Chief Executive Officer for 2009. Thank you for the privilege of allowing me to serve you.

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APMP®

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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.

Change of Address and Correspondence

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 became a member.

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

Barry Fields
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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)
- Half Page: $1,200.00 (B&W)

*15% discount for all contracts of three or more consecutive issues with payment in advance.

Rates for 2009 will be published in the Fall/Winter 2008 issue.

Schedule:

- Ad commitment (50% 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).

To Secure Advertising Space:

Please contact John Elder at (703) 841-7809 or email jelder@caci.com.

Advertising Format and Guidelines:

Submit all artwork electronically as CMYK or Grayscale 300 dpi TIFF or PDF, with 1/8th inch bleeds (if applicable) and crop marks to colleen@24hrco.com.

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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Call: David Winton at (949) 493-9398

If your product or service advances the art, science, and technology of business development or proposal management, our readers want to hear about it.

If what you are selling promotes professionalism in a dynamic profession, our readers are interested.

If your organization is looking for talent, you will find it among our talented readers.

If you seek the means to help people shape their future, consider this journal—a proven venue that offers both “best value” and best price.

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.*

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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 due	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:

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Jayme Sokolow, Assistant Managing Editor/ Chair of the Editorial Advisory Board	(301) 933-3989 jsoko12481@aol.com
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.

Copyright

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Welcome

by John Elder, AF.APMP

What an exciting time to be part of APMP! Our Association has taken many steps forward this year. The 19th Annual APMP International Conference and Exhibits in Rancho Mirage, CA was another success with a record-setting attendance of 604 professionals. The APMP Forum, podcasts, and archives of the popular Wordman articles are available on the Website. APMP now has an official group on LinkedIn to facilitate networking. The APMP Board of Directors approved the charter of the Australia New Zealand (ANZ) Chapter on 2 October 2008 for all proposal professionals in Australia and New Zealand, and those from Pacific Rim countries where no local APMP chapter currently exists.

In this issue, there is an announcement regarding the Accreditation Program. Chuck Keller, APMP Fellow, has accepted a new role as Accreditation Program Director. He is the primary contact to respond to questions about the Professional Accreditation Program and to provide information on training and approved training organizations.

Chuck also contributed an article to this issue of *The Journal* based on his entertaining and original presentation at this year's conference. *The Proposal Exorcist: Attacking 12 Proposal Demons* describes the most common situations that can bedevil a proposal professional and how to handle them without feeling the fire.

Often there is confusion regarding the specific roles of the capture manager, the proposal manager, and the program manager during the business development lifecycle. What is each responsible for, and how do they work together? Frequent *Journal* contributor, Jay Herther AF.APMP, answers these questions in his article that explains the handoffs among each of these managers. He provides practical techniques for making sure that there is a smooth transition from the Capture phase to the proposal team to the program team.

YOU are invited to contribute to the Journal!

Do you find yourself checking proposal sections online more often than on paper? Have some of your Pink or Red Team reviewers participated virtually instead of in person? According to Mitch Boretz, APMP Fellow, and Colleen Jolly, AM.APMP, typefaces and page layouts can be easier to read on paper then on the computer screen. Read their article to learn ways to design your document for on-screen legibility that aids electronic reviews.

The Call for Papers for the 20th Anniversary Annual APMP International Conference & Exhibits is available on the Website. This conference will be held at the Sheraton Wild Horse Pass Spa and Resort in Chandler, AZ from 9–12 June 2009. Conference Co-chairs Kirste Webb and David Winton are looking for presentations that cover the business development lifecycle from market development and business strategy, to capture development and strategy, through proposal development and strategy, and professional development. Presenting at the conference is a great way to contribute not only to the success of APMP, but also to our Body of Knowledge; please consider participating.

You are invited to contribute to *The Journal.* We are looking for APMP members who would like to serve as outside reviewers of articles submitted to us for publication. We also are looking for more book reviewers. Finally, we want to encourage you to consider submitting articles for consideration. If you are interested in serving as an outside reviewer, contact Jayme Sokolow, Assistant Managing Editor (jsoko12481@aol.com). If you would like to write a book review, contact Betsy Blakney, Books Editor (bblakney@unitech1.com). If you have an idea for an article, contact Jayme Sokolow; Ali Paskun, Assistant Editor (booklover@erols.com); or me (jelder@caci.com) for more information.

APMP®
Annual International Conference & Exhibits
20th Anniversary

"Knowledge is Power"

June 9-12, 2009, Chandler, AZ

Request for Presentations is Open!

We are looking for case studies, lessons learned, panel discussions, and tips and techniques that proposal professionals of all types can take home and apply in their workplace. We are seeking presentations across the full spectrum of business development from market development and business strategy, to capture development and strategy, through proposal development and strategy, and professional development.

Some of the topics include:

- Market Assessment
- Opportunity Qualification
- Strategic Planning
- Teaming and Subcontracting
- Capture Planning
- Proposal Tools and Techniques
- Knowledge Management
- Proposal Production
- Reviews
- Pricing
- Oral Presentations
- Lessons Learned
- Decision Making
- Team Building
- Mentoring and Coaching.

Please submit your topic and abstract online by Friday, November 14, 2008, at http://www.apmp.org. Speakers for the 20th Annual APMP International Conference & Exhibits will be selected using a competitive process. We plan to announce presenters by December 12, 2008.

Conference session lengths will be 1.5 hours or 3 hours with a 15 minute break.

All selected presenters will receive a $100 discount off the conference registration fee. If you are selected as a presenter, we will work with you to develop your presentation and the information (your presentation abstract and biographical sketch) needed to publicize the presentation.

Additional Details

Selected presenters are invited to write an article for *The Journal of the Association of Proposal Management Professionals* and/or the *APMP Perspective*. If you are interested, please contact David Winton, and he will inform you of the publication requirements and deadlines for submission.

For those who have written books in the area of proposal management, we invite you to submit your books for review in *The Journal*. If you are interested, please let us know if you are willing to provide a complimentary copy for review. Finally, we would also like to include your book as part of the APMP Bookstore at the conference. Although still in the planning stages, we are considering having author signing tables and informal roundtable sessions during the conference where you could discuss your work.

We thank you in advance for your consideration and participation.

Sincerely,

Kirste Webb and David Winton
Conference Co-chairs

ATTACKING 12 PROPOSAL

The Proposal Exorcist

DEMONS

by Chuck Keller, AF.APMP

Haunted by proposal demons?
Let Brother Chuck help you exorcize them.

*To my congregation of proposal brothers and sisters: as we toil to develop winning proposals, **beware of devilish proposal demons**. These demons can deceive us to use proposal practices that we think are correct, but are not, or, worse yet, to use practices we know to be incorrect.*

These demons can come in many forms with different degrees of how much they can harm your proposal. Their evil impact can range from minor inefficiencies and frustrations to the trouble-plagued, gut-wrenching proposal, known in our profession as the "proposal from hell."

My sermon today is about how to avoid or purge 12 proposal demons of different shapes and sizes that can bedevil your proposal effort. It is based on sermons that this proposal exorcist gave at two recent APMP conferences: the 2007 Southern Proposal Accents Conference and the 2008 APMP Annual Conference. To support my sermon, I will also provide quotes of wisdom and wit from a variety of sources.

Some of you may find I am "preaching to the choir" because you are well aware of these demons and their wickedness and have ways of warding them off. However, whatever your proposal skills or experience may be, I think all of you will find some value in my sermon's observations and advice.

There are many seats available in the front pews, so, my friends, I encourage you to move closer to the front. Then please open your Proposal Exorcism Handbook to Chapter 1, and I will begin.

Proposal Demon #1: The "Barbed Wire" Demon

"I used to think it was awful that life was so unfair. Then I thought, wouldn't it be much worse if life were fair, and all the terrible things that happen to us come because we actually deserve them? So, now I take great comfort in the general hostility and unfairness of the universe."

—Marcus, *Babylon 5*

This demon lives in a "wired" Request for Proposal (RFP), a solicitation written to give competitive advantage to a contractor favored by the customer in a presumably fair procurement process. If you are the contractor (the wire-ee?) that is favored by a wired RFP, you probably do not see this type of solicitation in demonic terms. But if it is not wired for you, it can be a demon that is difficult to battle.

> *"The devil made me do it."*
> *—Flip Wilson*

The key to combating this demon is to identify the barbs in what may be a wired RFP, and when you think you are facing this demon, consider a no bid. Here are some possible signs of a wired RFP:

- Has product or service, experience, or schedule delivery requirements that can only be met by a particular bidder—and if that is you, good for you
- Asks for information that can only be provided by a particular bidder—and, again, if that is you, good for you
- Requires a firm fixed fee price for a technical product or service while providing little detail about the specifications
- Allows little time from RFP release to the proposal submittal deadline
- When you submit questions or comments to resolve the above issues, the customer seems unsympathetic to your concerns by basically responding with "what-you-see-in-the-RFP is-what-you-get" answers.

Instead of pointing to a wired RFP, these signs may just reflect a poorly written RFP, ineffective acquisition plan, or uncooperative customers who really do not know what they want or the best way to get it. Whatever the cause, it may be best for you to no bid the RFP and save your bid and proposal resources for another RFP—and other demons you have a chance of beating.

Proposal Demon #2: The "So What?" Demon

"My most important piece of advice to all you would-be writers: when you write, try to leave out all the parts readers skip."

—Elmore Leonard

Too often proposals have content that fails the "So what?" test, a failure caused by demons in the following forms:

- **Stating you're pleased or proud.** Does your customer care if you are pleased to submit the proposal or that you are proud of your product, service, or experience?
- **Claiming you understand customer needs or are committed to meeting those needs.** Stating that you understand or are committed does not prove that you do.
- **Citing an objective, philosophy, or policy.** It may be your objective, philosophy, or policy to do something, but that does not mean you do.
- **Stating something is important or crucial to do**. Rather than knowing you "share their pain," I think your customers are more interested in knowing the details of how you will meet their needs.

It is not that using the above statements is necessarily bad. What is bad is their overuse at the expense of describing the solution you are proposing to meet the customer's needs. Let the details of your solution in the proposal show that you understand and are committed. Let the details show that your solution is not just an objective, philosophy, or policy. Ironically, the devil is in the details, and details in a proposal can be good when they explain your solution and the benefit of that solution to the customer.

To attack these demons, also known as proposal fluff, stay focused on answering the 5Ws and 1H about your proposed product or service:

- **Who** will provide it, and **who** will use it?
- **What** does the customer want, and **what** work is needed to provide it?
- **When** and **where** will it be produced and delivered?
- **How** will it be produced and delivered, **how** will it benefit the customer, and **how** much will it cost?
- **Why** is it necessary, and **why** are you proposing the solution to provide it?

In answering these questions, balance your response between the extremes of "trust me" and over-commitment:

- **"Trust me"**—providing insufficient details indicating that your solution will be formed after you get the contract
- **Over-commitment**—providing details that will not and cannot be known until after you get the contract.

"From word to deed is a great space."
—French Proverb

Find a credible point between these extremes, showing the customer that you have done your homework in analyzing their needs and developing a solution to meet those needs.

Here are some other examples of how this demon can cause your proposal to fail the "So What?" test, and what you can do to fight back:

- **Making Claims Without Proof**—When you claim superlatives, such as top quality, lower risk, and cost-effectiveness about your product or service, substantiate your claim with proof, such as citing proven experience, testing results, or customer satisfaction metrics.
- **Listing Features Without Benefits**—Link the features of your proposed solution to the benefits they will provide the customer. Do not assume customers will deduce the benefits on their own.
- **Data Dumping**—Avoid using filler material (content that is neither requested by the RFP nor provides information helpful to the proposal evaluator) because it is readily available, and you think its use will make your proposal appear more informative.
- **The 47-Years-of-Experience Syndrome**—I coined this term based on a proposal review that I supported. The review team noticed, and seemed amused by, the frequent claim in the proposal that the company had 47 years' experience. I sensed that the proposal team was told that the company's experience (47 years' worth) was a proposal theme that needed to appear in the proposal—and appear it did. The proposal theme would have been better served by focusing more on how this experience would be applied to developing and providing the product or service solution. Your company has __ (you fill in the blank) years' experience—***so what?***

Learn to confront your inner proposal demons.

Proposal Demon #3: The "Writer's Block" Demon

"Writers have two main problems. One is writer's block, when the words won't come at all and the other is logorrhea, when the words come so fast that they can hardly get to the wastebasket in time."

—Cecilia Bartholomew

This demon is an occupational hazard that I believe strikes all writers—for proposals and otherwise. It prevents or slows the flow of words from your head to the document regardless of how motivated you are to write. In our business facing proposal deadlines, we cannot afford this demon to obstruct our proposal writing.

> "Writing is easy. All you do is stare at a blank sheet of paper until drops of blood fall from on your forehead."
> –Gene Fowler

Here is how to defeat this demon and get your words flowing:

- **Follow the Outline/Storyboard.** Use these planning devices to provide a starting point for your writing. Stay focused on what you planned to write even if you have not collected all the information you need to do so.
- **Review the Capture Management/ Strategy Plan and Proposal Themes.** Amplify your proposal content by addressing the proposal strategies and themes developed during your capture management/strategy planning.
- **Answer the 5Ws and 1H Questions.** Provide details for answering the who, what, when, where, how, and why questions about your proposal solution. Answering these questions can force the words to flow, plus provide customers with information they need to evaluate your proposal.
- **Write Quickly and In Any Order.** Do not try to write the perfect first draft. Write it quickly, and then iteratively revise. Trying to write the perfect first draft can cause writing paralysis and impede the writing process. Also, do not get locked into starting at the beginning of your section assignment. Begin writing in any part of the section if it can help you begin writing.
- **Write About What You Know Best or Have the Most Interest.** Make it easier to start your writing by taking advantage of your knowledge and interests. Write content that requires no research or data collection on your part. Write about topics that you know the most about or appeal to your interest. Writing can be much easier when you actually know what you are writing about and enjoy the topic. Unfortunately, knowing and enjoying your topic are not always prerequisites for being assigned to write a proposal section.
- **Note What You Intend to Write.** Even if you do not have the details for your writing assignment, at least write down what you intend to write as a placeholder for referral later.
- **Write Introductions, Summaries, and Conclusion Later.** It can be unproductive to write section or volume introductions, summaries, and conclusions without knowing the details that are to be introduced, summarized, and concluded. Therefore, delay writing these overviews until you know the details on which they will be based. Writing an introduction, summary, or conclusion that describes a work-in-progress proposal can be fruitless and squander valuable time.
- **Just Start; When Stuck, Take a Break.** Start writing no matter how unmotivated, unprepared, or weary you may be. When I do not feel like writing, I find that if I force myself to start, it does not take long for my creative juices to flow, albeit sometimes in a very weak trickle. When the words do not come or you are just tired of writing, stop, take a short break, and resume when you have recharged your writing battery.
- **Use a Thesaurus and Dictionary.** Stuck for the right word or tired of using the same word repeatedly? Use a thesaurus and dictionary to bring clarity and variety to your writing.

- **Verbally Explain What You Want to Write.** When you have trouble expressing yourself on paper, step away from the keyboard, and tell a colleague what you are trying to convey. You may find that talking will help you organize and initially express your thoughts more effectively than through writing.
- **Write What You Would Like to Know If You Were the Evaluator.** Think like your anticipated proposal evaluators. If you were evaluating the proposal, what would you need to know? Purists may caution you to provide only what is asked for in the RFP. However, I believe evaluators have personal questions (unstated requirements, if you will) they would like addressed in the proposal over and above (and in between) the information required by the RFP. If you can answer these questions, you may get a better evaluation grade.
- **Start With Boilerplate and Revise.** Start with content from other proposals or other reference documentation, and tailor it based on the RFP requirements. However, beware of the "Boilerplate Special Indigestion" demon that I will describe next.

Feed your "Boilerplate Special Indigestion" Demon at the Vortext in Atlanta, GA.

Proposal Demon #4: the "Boilerplate Special Indigestion" demon

> *"Knowledge is of two kinds. We know a subject ourselves, or we know where we can find information on it."*
>
> —Samuel Johnson

The starting point for many proposal writers is to use boilerplate information from old proposals or other reference documents. However, boilerplate can be a mixed blessing. Yes, it can kick start your writing. However, without enough tailoring to the needs of the customer, a boilerplate-heavy proposal can appear to offer a generic one-size-fits-all solution for any customer. This is not the impression you want in a customer-focused proposal.

Here are ways to settle upset stomachs—burp! (pardon me)—caused by this demon:

- **Follow Your Writing Plan.** Follow the approved outline or storyboard for your section, including the use of the proposal strategies and themes developed during your capture management/strategy planning. Fit the boilerplate to your outline and not vice versa.
- **Answer the 5Ws and 1H Questions.** Answer these questions to describe your solution for the proposed product or service that meets the needs of the customer.
- **Cite Experience.** Cite examples of your experience, such as case studies, quality performance examples, and lessons learned of relevant work, to substantiate your ability to provide the proposed solution.
- **Assess Risk.** Present a risk assessment and mitigation plan to show your understanding of the technical, management, schedule, and cost risks of providing the solution.
- **Mention the Customer.** Use the customer's name in the proposal, while, of course, deleting other customer names from the proposal boilerplate. Explain the customer's role in how you will manage the delivery of the proposed product or service.

- **Be Accurate and Understand What You Use.** Verify the accuracy of the boilerplate. It may be inaccurate because it is now out-of-date—assuming it was accurate when first used—or was not true when originally used. Only use boilerplate that you understand. I once asked someone the meaning of something he had provided for a proposal. His response was he did not know; he had taken it from another source. If you do not understand something in your proposal, how do you expect the customer to do so?
- **Use a Boilerplate Archive.** Build and maintain a boilerplate archive (an automated or manual system) that organizes topics, into easily accessible modules. For example, rather than keep a collection of management sections or volumes as reference boilerplate, divide this boilerplate into specific topics, such as project organization, communication plans, financial and budgetary planning, and reports. Store personnel resumes (for key personnel sections) and information about current and past contracts (for past performance/relevant experience sections), and regularly update this information to reflect changes in personnel or contract status. If your proposals often answer the same basic questions from RFPs, place core answers to these questions in your archive and tailor the answer to meet the requirements of the RFP.

“This is the challenge of writing. You have to be very emotionally engaged in what you’re doing, or it comes out flat. You can’t fake your way through this.”
—Real Live Preacher, RealLivePreacher.com Weblog

Have a biolerplate archive but do not try to carry it all at once, or you will face the wrath of not one but two demons.

Proposal Demon #5: The “Lazy List” Demon

“Laziness is nothing more than the habit of resting before you get tired.”
—Jules Renard

My late mother spoke of a person carrying a lazy load—hand-carrying a large load in one trip when it would have been better to make the transfer in more than one trip. Her point was that it was laziness that led the person (me?) to avoid multiple carries.

Laziness can also affect proposal writing. I think it can be seen in what I call the “lazy list”—a bulleted list that provides little information and leaves wasted space on a page. Here is an example.

“Acme Corporation will provide the following reports:

- Staffing report
- Budget report
- Inventory report
- Schedule report
- Quality report.”

It is not that this list has no useful information. The problem is that it misses the opportunity to provide amplifying details about the reports and fails to efficiently use the page space. In a full-page layout, the frequent use of cryptic bulleted lists can waste space and make it hard to produce a page-limited proposal. Do not get me wrong; there is a place for bulleted lists in a proposal, for they can convey important information and allow proposal evaluators to pick out key points while skimming a proposal. If you use them, ensure that they are “data rich” with useful information.

So how can you tame this demon? When you use a “lazy list,” think tables. Taking my example, you could convert it into the informative table shown in Figure 1. If you did, it might have pleased my mother.

Report	Submittal Date	Originating Department	Recipient	Purpose
Staffing	Weekly	HR	CO and Project Manager	Names, positions, and weekly labor hours of all assigned contractor personnel
Budget	Monthly	Finance	CO and Project Manager	Budget expended, budget available, and explanation of budget variances
Inventory	Monthly	Material	Project Manager	Inventory of all vehicles, hardware, tools, and test equipment
Schedule	Monthly	Project Management	Project Management	Milestone status of most recently completed month amplified with a narrative summary of performance
Quality	Quarterly	QA/QC	Project Manager and Quality Officer	Quality inspection results and corrective actions, minutes of quality improvement meetings, and risk assessment of next month's milestones

Figure 1. The "Lazy List" example was converted to an informative table.

Proposal Demon #6: The "Skeleton-in-the-Closet" Demon

"Honesty is the best policy—when there is money in it."

—Mark Twain

If your business has never had or will never have a weakness in your product, service, or in the performance of providing either, this demon poses no threat to you. However, for those who have had lapses in the quality of their work—and I think that includes most, if not all, of us—keep listening.

Simply stated, if you have a weakness (a skeleton in the closet) as you prepare your proposal: (1) acknowledge it, (2) resolve or mitigate it, and (3) have a plan to prevent its recurrence. The following amplifies how to rid your closet of these demons and prevent their return:

- **Be Candid With Yourself.** Perform a truthful assessment of your weaknesses and strengths during your capture management/strategy planning. Once identified, do not ignore a weakness or hope your customer will not know about it. Assuming that your customer knows your weakness can be just the incentive you need to resolve or mitigate it for the proposal.
- **Attack Your Weakness.** Analyze the cause of the weakness, and develop a plan to resolve or mitigate weakness as you prepare the proposal. By doing so, you may be able to turn a weakness into a strength or, if you cannot totally resolve it, at least offset the impact.
- **Do Not Repeat It.** Develop a plan to prevent the weakness from occurring again. Learn from your mistakes.

One of the most common skeletons in the closet can appear in a proposal's past performance section. The RFP requirements for describing past performance contracts may force you to cite work in which you have faced a technical, management, schedule, or cost problem. This is an example of where taking the three-step approach to address a weakness would be appropriate: acknowledge the performance weakness, describe what caused the weakness and how you resolved it, and explain what you did to prevent it from happening again. The RFP proposal instructions, especially if they are from the Federal Government, may encourage such an approach to address contract issues. Telling your side of the story can offset a poor past performance evaluation submitted by a customer that you have cited as a past performance reference. You should have resolved the problem for this customer and have a successful approach to preventing its recurrence before addressing it in the proposal.

If you are sure that the customer knows about your weakness, address it with the three-step approach. If you think the customer perceives that you have a weakness and you do not, address it by explaining why it never existed.

However, if you are sure that the customer does not know about the weakness—and you are not forced to address it by RFP instructions—it may be prudent not to analyze and describe the weakness in the proposal. That does not mean you should not first conduct the three-step process for that weakness. You may find that, with some creative strategizing and risk mitigation, you can overcome or mitigate the weakness, allowing you to report it as strength in the proposal.

What happens if you identify a weakness, but are unable to resolve or mitigate it? Well, you have got a problem. But at least you know what may be a good reason to no bid or, if you decide to bid, know why you may not win the contract.

"The Exorcist" Stairs, Georgetown, Washington, DC.

Proposal Demon #7: The "Busy or Weak Writing SME" Demon

> *"An expert knows all the answers—if you ask the right questions."*
>
> —Author Unknown

An important contributor to proposals can be the subject matter experts (SMEs) who have limited proposal writing skills or time to exercise whatever skills they do have on a proposal. The demon here is how to get proposal information from a writing- and time-challenged SME. Assault this demon with sound preparation and collection techniques.

The following are recommendations for preparing the SMEs to provide the information:

- **Perform Training.** Conduct proposal training for the SMEs. Workload permitting, they could receive training between proposals or right before it is needed (just-in-time) during proposal development.
- **Prepare With a Heads-up.** Provide the SMEs early notice of the support you need from them and when it will be needed. This will give them time to fit the proposal work into their schedule. Then if you find that an SME will not be available when needed, you will have time to look for a replacement.
- **Supply RFP Material.** Give SMEs a copy of the RFP and a detailed section outline of their assigned section with a cross-reference to the applicable RFP sections. Discuss with them their role and what information you need from them.

If you find that SMEs cannot or will not take responsibility for the writing assignment and that you have prepared them as per my recommendations, use the following approaches to collect the needed information:

- **Interview**—Ask the SMEs questions in an oral interview. After the interview, write a draft, and provide it to them for review and written revision.

- **Written Questions**—Provide written questions for the SMEs to answer in writing.
- **Boilerplate**—Provide boilerplate or other reference information to SMEs for review and written revision.
- **Review and Revision**—Write an initial draft, and provide it to the SMEs for review and written revision.

When you do the above, allow time to go back to the SMEs to clarify their inputs, obtain additional information, and have them review the resulting section draft for accuracy and completeness. Always have the SME conduct this review.

Proposal Demon #8: The "Incumbent–itis" Demon

> *"Arrogance is a kingdom without a crown."*
> —American Proverb

Always ask for a proposal debrief whether you win or lose.

As difficult as it can be to win a contract the first time, it can be even more challenging for an incumbent contractor to win a recompete of that contract. This demon can instill an incumbent with an inflated confidence about its chances to win a recompete for a contract it currently serves and serves well. This confidence—arrogance, if you will—can lead an incumbent to put less effort in its proposal than it should.

Here is how you can counter this demon, and increase the likelihood of winning a recompete contract:

- **Perform in Current Work.** One of the best ways to win as an incumbent is to perform well in the current job. Give your customer tangible reasons for keeping your people and company around, and earn yourself a performance record that you can extol in your proposal.
- **Remember Proposal Lessons Learned.** Analyze and apply lessons learned from the proposal you submitted for the current contract. What were its strengths and weaknesses when it was reviewed by the Red Team or when you were debriefed by the customer about your winning proposal? Oh, you did not get a proposal debrief? Always ask for a proposal debrief whether you win or lose.
- **Provide RFP Assistance.** If possible, and if it does not preclude you from bidding on the re-compete, help the customer develop the recompete RFP. If you do, you can become familiar with the RFP before it is released and possibly influence the RFP with work performance or proposal preparation requirements that will favor your company. Can you say wired RFP? It can also allow you to get a head-start in planning your recompete proposal. Getting an early start in your proposal planning is a good idea for any proposal whether or not you are the incumbent.
- **Assess Why There Is a Recompete.** Determine why there is a recompete and ensure that the reason(s) influence your capture management/strategy planning. Is there a recompete because of your poor performance as the incumbent, or is it because it is just time for a recompete due to the pending end of the current contract and has nothing to do with your performance?
- **Evaluate Your Competition.** Take your competition seriously by doing a frank assessment of their strengths and weaknesses as part of your capture management/strategy planning. In your proposal, offset your competitors' strengths and exploit their weaknesses. Do not underestimate competitor abilities or overestimate yours because you are the incumbent.
- **Show Your Knowledge of the Customer.** In your proposal, provide specific examples of your experience and performance in your current contract. Describe what you have done, substantiating your proven performance and understanding of the work, and how this experience will be applied as a benefit for the recompete contract. Provide background details in the proposal that only an incumbent could provide. Based on your knowledge of key customer personnel, determine who might be evaluating the proposal—and write the proposal with these people in mind as your proposal audience.

- **Offer Continuity *and* Improvement.** As the incumbent emphasize your legacy knowledge and ability to provide staff and service continuity from the current contract to the proposed one. However, consider proposing changes to show that you are looking to enhance your performance while maintaining the good product or service you have been providing. Offering your plans for product or service improvements could offset the improvements proposed by your competition. However, you might have the challenge of explaining in the proposal why these proposed improvements were not made for the current contract.
- **Assemble a Knowledgeable Proposal Team.** Use SMEs familiar with current contract work to develop the recompete proposal. Admittedly, this could be difficult to arrange; they may be too busy serving the current contract to work on the proposal. Regardless, do your best to get them involved so their knowledge of the customer and the current work is reflected in the proposal. In the proposal, ensure that these SMEs do not focus on what ***is*** being done on the current contract at the expense of what ***will*** be done for the new contract. Current work requirements and procedures—familiar to the SMEs—may be different for the new contract.
- **Do Not Help Your Competition.** As the incumbent, you should have a much better understanding than your competition about the customer's needs and requirements and how to meet them. Do not weaken this advantage by asking the customer questions that could lead to answers more helpful to your competition. Because of your in-depth knowledge of the customer and work requirements, your question may address a problem, solution, or other issue of which your competition is unaware. Be reluctant to ask for a proposal submittal extension. If you—as the incumbent—are struggling to produce a compliant and competitive proposal on time, your competition might be struggling even more. An extension could prove more helpful to your competition.

[as the incumbent] be reluctant to ask for a proposal submittal extension.

Proposal Demon #9: The "L and M Disconnect" Demon

"When we seek for connection, we restore the world to wholeness. Our seemingly separate lives become meaningful as we discover how truly necessary we are to each other."

—Margaret Wheatley

In a Federal RFP, Section L provides proposal preparation instructions, including the topics to be addressed in the proposal, and Section M describes how the proposal content will be evaluated. It seems logical to expect that there would be a close correlation between the proposal content and the content that will be evaluated for the proposal grade. However, this demon can lead to an illogical disconnect between the guidelines in these two RFP sections.

To address this demon, I will focus on Sections L and M disconnects in Federal Government RFPs. However, this demon can infest commercial, state, or local RFPs that do not use Sections L and M as the designations for the proposal instruction and evaluation sections.

There are two disconnect demons you may face, and here is what you can do to respond to them:

The Section L and Section M demons may often be at odds.

- **Section L Asks For Content That Section M Does Not Indicate Will Be Evaluated.** Realize that this may be not be an RFP mistake for a customer may want information that it will not formally grade. For example, you can expect that even if Section L asks for an Executive Summary, the Executive Summary will not appear as an evaluation factor in Section M. Apparently the Federal Government believes that anything in the Executive Summary should be in other parts of the proposal that will be evaluated. For this disconnect, either provide the requested content (to play it safe) or, before you do, ask the customer if the content is required although it willl not be evaluated.
- **Section M Identifies Content That Will Be Evaluated, While Section L Does Not Ask For This Content.** Of the two disconnects, I think this one has the greatest chance of being an RFP mistake. For this disconnect, either address the Section M content within the framework of the summary proposal outline dictated by Section L (again to play it safe) or, before you do, ask the customer if this evaluation topic really needs to be addressed in the proposal.

In either case, you could address the disconnected topic in your proposal without asking the customer for clarification, or provide the information only if the customer directs you to do so in response to your question for clarification. It is your call.

As you plan your proposal, remember the following priority of RFP sections for outlining the proposal:

1. Section L (proposal instructions)—use to develop the summary proposal outline
2. Section M (evaluation criteria)—integrate and subordinate topics within the summary outline dictated by Section L
3. Section C (specifications such as a statement of work or performance work statement)—integrate and subordinate topics within the outline dictated by Section L and amplified by Section M.

By the way, if you ever respond to any RFP that includes only equivalent Sections M and C, organize the proposal outline by Section M and integrate and subordinate Section C topics into the outline driven by Section M. This will ensure that you address all topics to be evaluated, something you might not do if you outlined the proposal based on Section C.

Proposal Demon #10: The "So Much to Write, So Little Space" Demon

> *"It usually takes a long time to find a shorter way."*
>
> —Anonymous

This demon appears in RFPs that impose page limitations in the proposal. Here are tips for cutting this demon down to size and fitting what you need in a page-limited proposal:

- **Plan Page Allocations.** During proposal outlining, set page targets for each proposal section with the cumulative total not to exceed the page allowance. If you know up front the number of pages you can work with in your section, you will find it easier to stay within the page allocation than writing what you think you need and then trimming. If you find that you do not have enough pages, consult with your proposal manager to reconsider your page allocation.
- **Use Graphics.** Use graphics that, compared to text, can reduce the space needed to address a topic in the proposal. Develop graphics that will allow you to trim details that otherwise would be provided in text. Normally an RFP will allow you to use a smaller type size in graphics. This requirement can be very useful in graphic callouts and tables using type sizes down to 8 point. compared to 11 or 12 point. type often used for text.
- **Use Layout and Typographical Options.** Pick the most space-efficient selections for the proposal margin, indent, font, and spacing (between characters—condensing and kerning—and between lines). Of course, use styles that comply with the RFP proposal instructions. You can also cut the length of a proposal by simply using one space after a sentence-ending period instead of two spaces. An easy way to do this when using Microsoft® Word is to use the "Find and Replace" function.

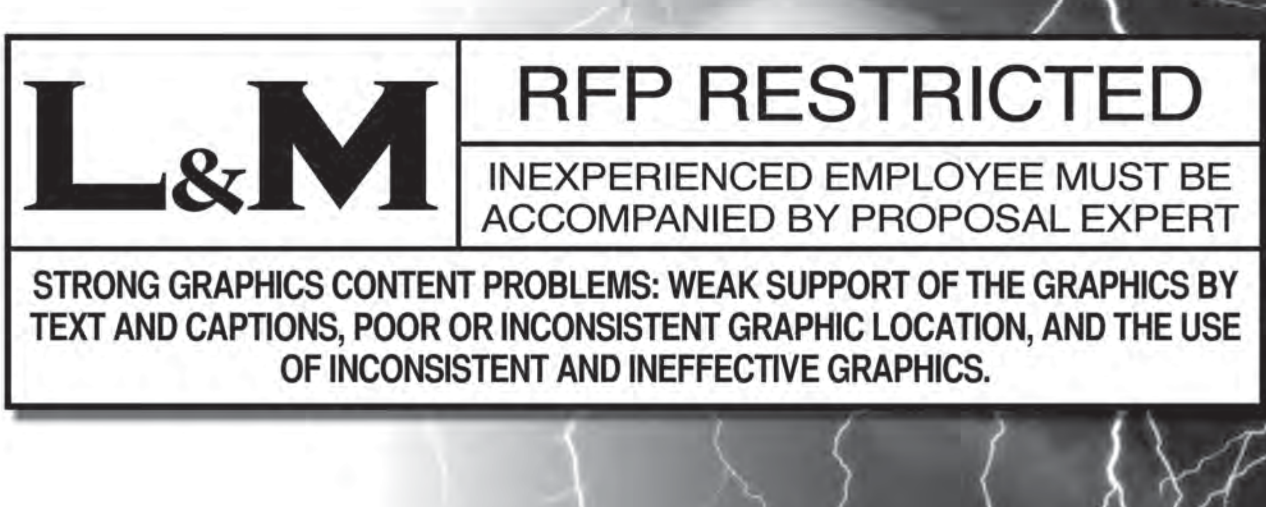
- **Make Referrals.** Rather than repeating content that has already been included in the proposal, refer the evaluator to that section for the information. However, if you think evaluators will not have access to the referred section, it might be best to repeat the content to ensure that they see it.
- **Be Smart About Content Placement.** Instead of placing information in page limited parts of the proposal, place it in the proposal where pages are not limited.
- **Offer to Make Details Available.** For content that could be helpful, but not absolutely necessary, indicate that it is available if desired by the customer.

Instead of placing information in page limited parts of the proposal, place it in the proposal where pages are not limited.

In addition to the above space-saving techniques, I recommend you apply different levels of responsiveness in your proposal. The level of detail, and the space needed to provide it, can vary to be responsive to the proposal instructions and product or service specifications. There are three levels of responsiveness that you can use, going from the most detailed to the least:

- **Level 1**—Provide a detailed response to explain your proposed solution—answering the previously described 5Ws and 1H questions—or to respond to a specific RFP request for information. This is the most typical and effective approach for responding to the proposal instruction section of an RFP. It is the approach that we proposal professionals should see as the standard for our proposal content.
- **Level 2**—Commit to comply with an RFP requirement without amplifying your response with the answers to the 5Ws and 1H questions. You simply restate the requirement or identify the requirement and where it appears in the RFP, and then indicate that you will meet this requirement. For example: RFP Section C.3.7 requires that your proposed product must operate in various environmental conditions, such as wind, temperature, humidity, precipitation, and altitude. Instead of describing the design features that allow your product to operate in these conditions, you state it will meet all required environmental conditions, listing what the specific requirements are or referring to the environmental requirements in Section C.3.7.
- **Level 3**—State that you take no exceptions or deviations to a requirement without describing the requirement or your approach (the answers to the 5Ws and 1H questions) to meet the requirement. For example: to indicate compliance with contractual clauses in the RFP, you state that you take no exceptions or deviations to the clauses.

Write to the appropriate level based on your best judgment and your understanding of the RFP's proposal instructions.



Proposal Demon #11: The "Every Picture Does Not Tell a Story" Demon

"So remember, every picture tells a story don't it"

—from the song "Every Picture Tells a Story" composed by Rod Stewart and Ron Wood

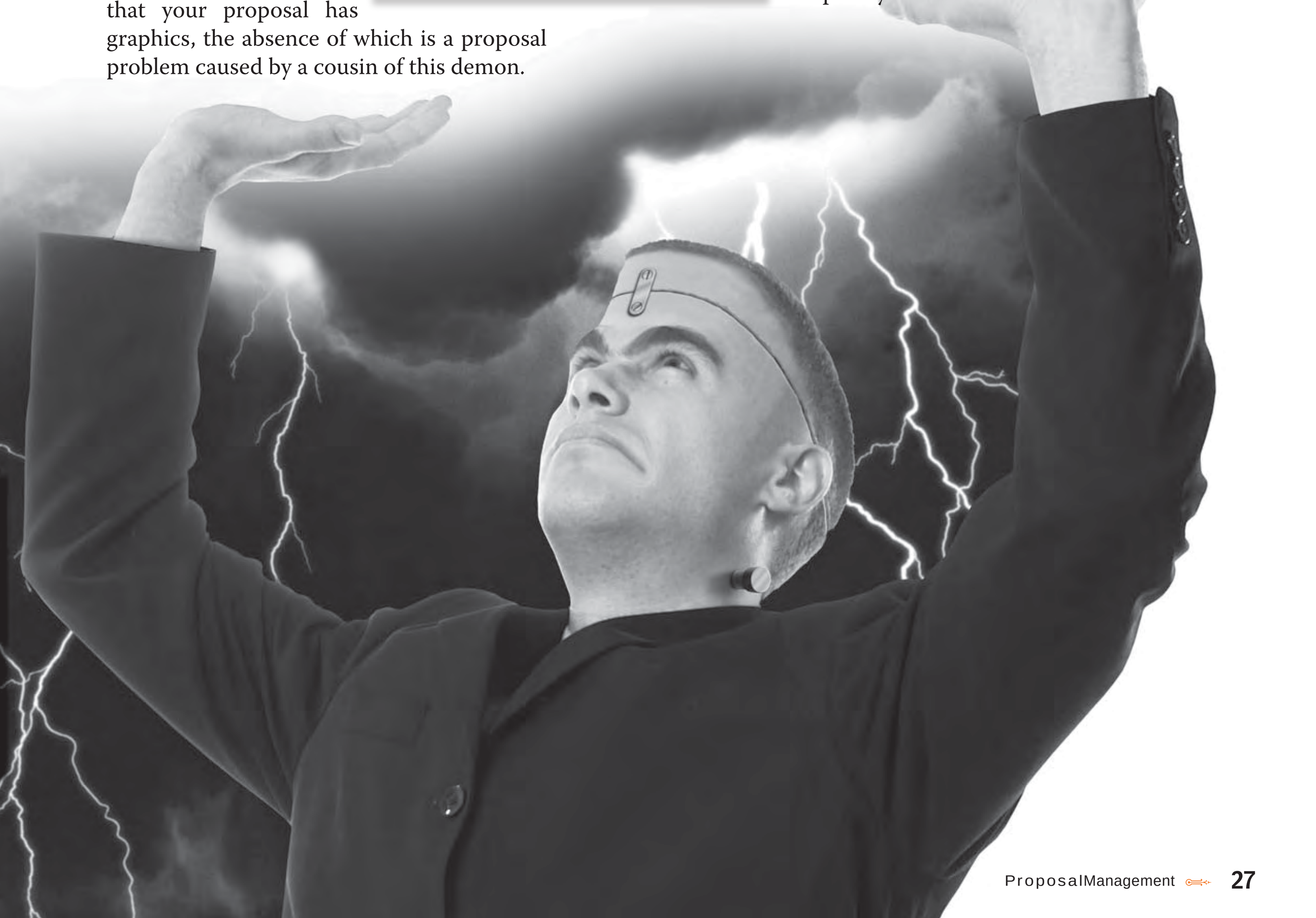
With all due respect to the rockers, Rod and Ron, there are many pictures in proposals that do not tell a story.

There are three basic problems that this demon can cause: (1) weak support of the graphics by text and captions, (2) poor or inconsistent graphic location, and (3) the use of inconsistent and ineffective graphics. This, of course, assumes that your proposal has graphics, the absence of which is a proposal problem caused by a cousin of this demon.

"A picture says more than a thousands words, but which words are these?"
—Taeke de Jong

Here are some ways to have your proposal "picture" tell your "story:"

- **Use Referrals and Captions.** Ensure every graphic has an introduction referral in the text. Introduce each graphic with an identifier (number, alpha-numeric, or letter) and a summary of its purpose or key point(s). Give each graphic an identifier and a caption, preferably an action caption that provides the key point(s) of the graphic. Use a consistent style for referrals, identifiers, and captions. Avoid the "throw-away" referral, which simply directs the evaluator to a graphic with a *"(see Figure x)"* with no description of the graphic's purpose or content. Graphics without introduction referrals or captions may be acceptable in a brochure, in magazine and newspaper articles, and even in a journal article, but not in a proposal document when it is important to make your point clearly and quickly.



- **Consider Graphic Location.** Place the graphic as close as you can after its first referral in the text. As a general rule for layout consistency, anchor less-than-full-page graphics at the top or bottom of a page. If you want the evaluator to alternate between text and a graphic that supports the text (as you might want in describing a complicated process or a company's organizational structure): (1) ensure that the graphic is placed so the evaluator's eyes can easily move between it and the text, and (2) when you have a graphic that supports a text description (such as a complicated process), refer to the graphic early in that description.
- **Use a Consistent Graphic Style.** Having graphic consistency can be challenging when graphics are developed by different people using a variety of software programs, such as Adobe Illustrator, Microsoft Excel, Microsoft Visio, Microsoft PowerPoint, and Microsoft Word. Nevertheless, set and enforce a consistent style for each type of proposal graphic. For example, have standards for type size and font family, color, rules (line width and style), shapes, such as those used in flow diagrams and organization charts, and the styles for tables, bar charts, pie charts, and graphs.
- **Avoid Eye Candy.** Have a purpose for each graphic. Do not use graphics just because they look good. Avoid cutesy clip art that has the look of comic book illustrations. I think this type of clip art can be appropriate in a PowerPoint presentation, but not in a formal business proposal. Avoid a bland, boilerplate appearance, such as a photo of people shaking hands or assembled in a meeting in which the attendees look like models posing for the camera.

"Don't mind criticism. If it is untrue, disregard it; if unfair, keep from irritation; if it is ignorant, smile; if it is justified it is not criticism, learn from it."
—Author Unknown

Proposal Demon #12: The "Red Team Responsibility Blues" Demon

"Action springs not from thought, but from a readiness for responsibility."
—Dietrich Bonhoeffer

This demon can lead to the failure of those who review ***and*** develop proposals to meet the following responsibilities:

- The responsibility of the Red Team to identify not only proposal deficiencies during its formal review, but to offer feasible recommendations for fixing the deficiencies
- The responsibility of the proposal team to consider carefully all Red Team recommendations and to implement accepted recommendations into the proposal.

Let us first address Red Team responsibilities. It should go without saying that these responsibilities should include becoming familiar with the associated RFP, including amendments, before the review; and understanding reviewer assignments, the factors that will be used to evaluate the proposal, and how the review process will be scheduled and managed. As important as these planning tasks are and the demons that can plague them, they are topics for another sermon. For today, I will focus on the responsibility of documenting review comments and recommendations for proposal team use.

I suggest that the review team document its findings using a form like the one in Figure 2. It can be a hard copy form completed by hand or a soft copy filled out in a Word file. I will highlight three key parts of the form to be filled in by the reviewer.

- **"Deficiency Description/Question" and "Recommendation"**—Use these blocks to address issues, such as identifying a discrepancy, asking a question, or requesting clarification, and to offer a recommendation for resolving the issue. It is not enough for reviewers to identify proposal problems; require reviewers to recommend specific and actionable remedies to solve them.

- **"Reviewer Log Number"**—Use this block to identify reviewer comments and recommendations for tracking and disposition. A simple approach is to have reviewers log each of their inputs with their initials and a number in ascending order.

Have the proposal team use the **"Disposition"** blocks for analyzing the reviewer recommendations and deciding whether to implement them. The blocks reflect that reviewers can make recommendations that should, should not, or cannot be accepted, and that ultimately it is the decision of the proposal team to implement the recommendations. The decision can lead to one of four dispositions.

- **Accept**—The recommendation is valid and will be implemented.
- **Reject**—The recommendation is rejected because it is wrong, inappropriate, unfeasible, or impossible to implement.
- **Optional**—The recommendation is valid; however, it is not considered critical to the success of the proposal. Therefore, the decision to implement is left to the discretion of the assigned proposal writer.
- **Research**—The recommendation could be valid based on more analysis, and if it is determined to be valid, it will be processed as an "Accept" or "Optional" disposition.

When a disposition decision has been made and the form marked accordingly, track the disposition to completion.

I know many reviewers like to make review comments and recommendations directly in the hard or soft copy of the proposal. However, compared to using the recommended form, I think inserting review comments in a proposal draft increases the chance of getting cryptic reviewer inputs with little or no detail about the proposal deficiency or how to fix it. Plus, widely dispersed comments in the lines or margins of a proposal can make it difficult for the proposal team to collect and evaluate these inputs and make sound decisions about whether to implement the recommended changes.

DISPOSITION:	ACCEPT	REJECT	OPTIONAL	RESEARCH
PROPOSAL SECTION AND TOPIC:				
APPLICABLE RFP SECTION:				
DEFICIENCY DESCRIPTION/QUESTION:				
RECOMMENDATION:				
REVIEWER:	REVIEWER PHONE/E-MAIL:	REVIEWER LOG #:		

Figure 2. Use this form for collecting and analyzing review comments/recommendations.

For reviewers who prefer to make their review comments directly into the proposal, I suggest that you use this method to note and organize your initial review thoughts, and to correct typos and make editing suggestions (although a Red Team review should not focus on editing). Then, transfer and translate your comments from the proposal draft to the review form for reporting what you consider major issues. The forms and the marked up proposal drafts can then be given to the proposal team for its use.

Regardless of how you document and evaluate Red Team review comments, both the reviewers and proposal staff have a responsibility as a team to produce the most compliant, compelling, and credible proposal they can.

> *"The devil hath power To assume a pleasing shape"*
> *—William Shakespeare, Hamlet*

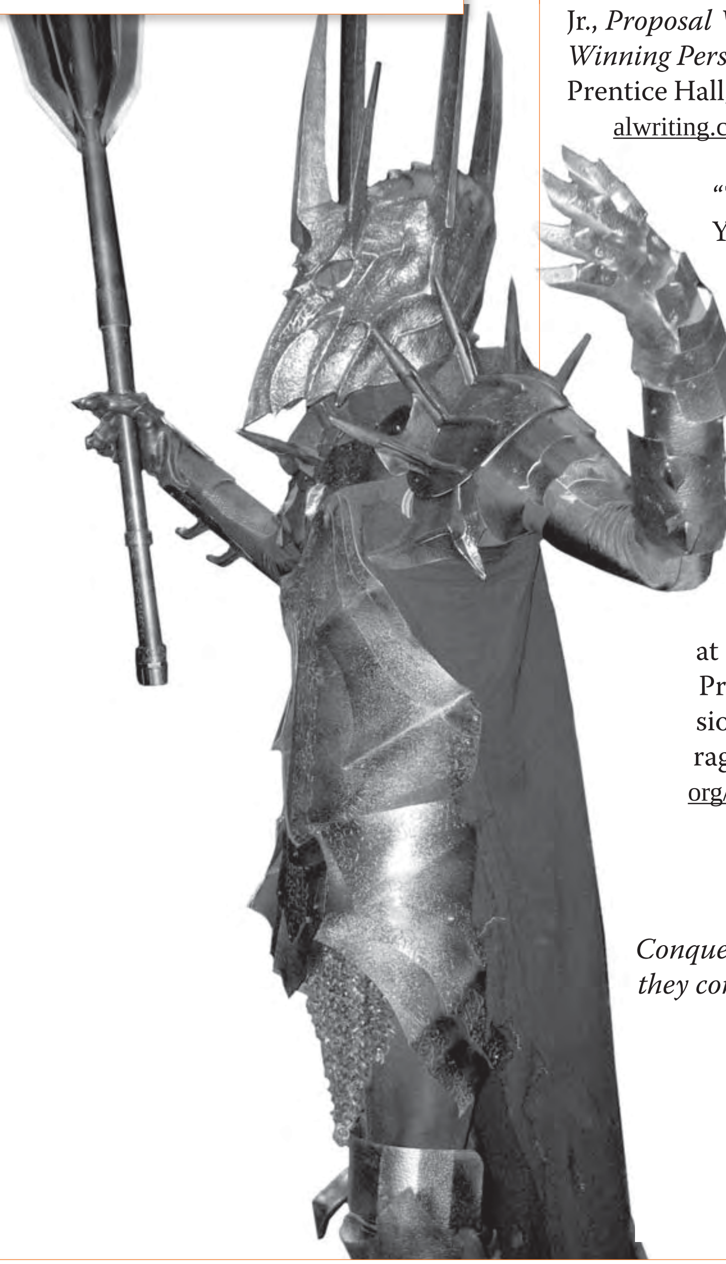
Amen

So my friends, after addressing this twelfth demon, I will conclude my sermon for today. Please heed my warning about their evils and my advice about avoiding and purging them from your proposals. Spread my message of action to our proposal brothers and sisters who did not attend the sermon. Be aware that there are more proposal demons than the ones I described today. However, if you can conquer these 12, I think your proposal work will be easier and more effective.

It is the sincere wish of this proposal exorcist that you go forth to where proposals from hell are few and winning proposals are many. Amen!

Beware this demon as he can lead to the failure of the review team and the proposal development team.

> *"Work and struggle and never accept an evil that you can change."*
> *—Andre Gide*



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All attributed quotes, except for the "Every Picture Tells a Story" lyric, came from *The Quotations Page* (www.quotationspage.com).

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Conquer your proposal demons before they conquer your next proposal!

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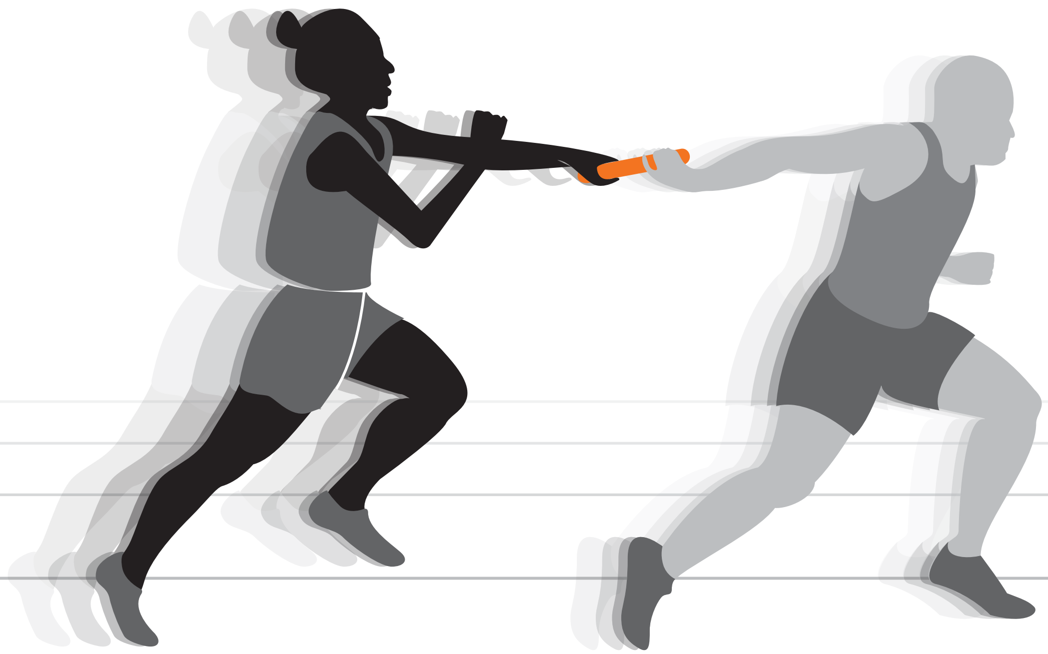

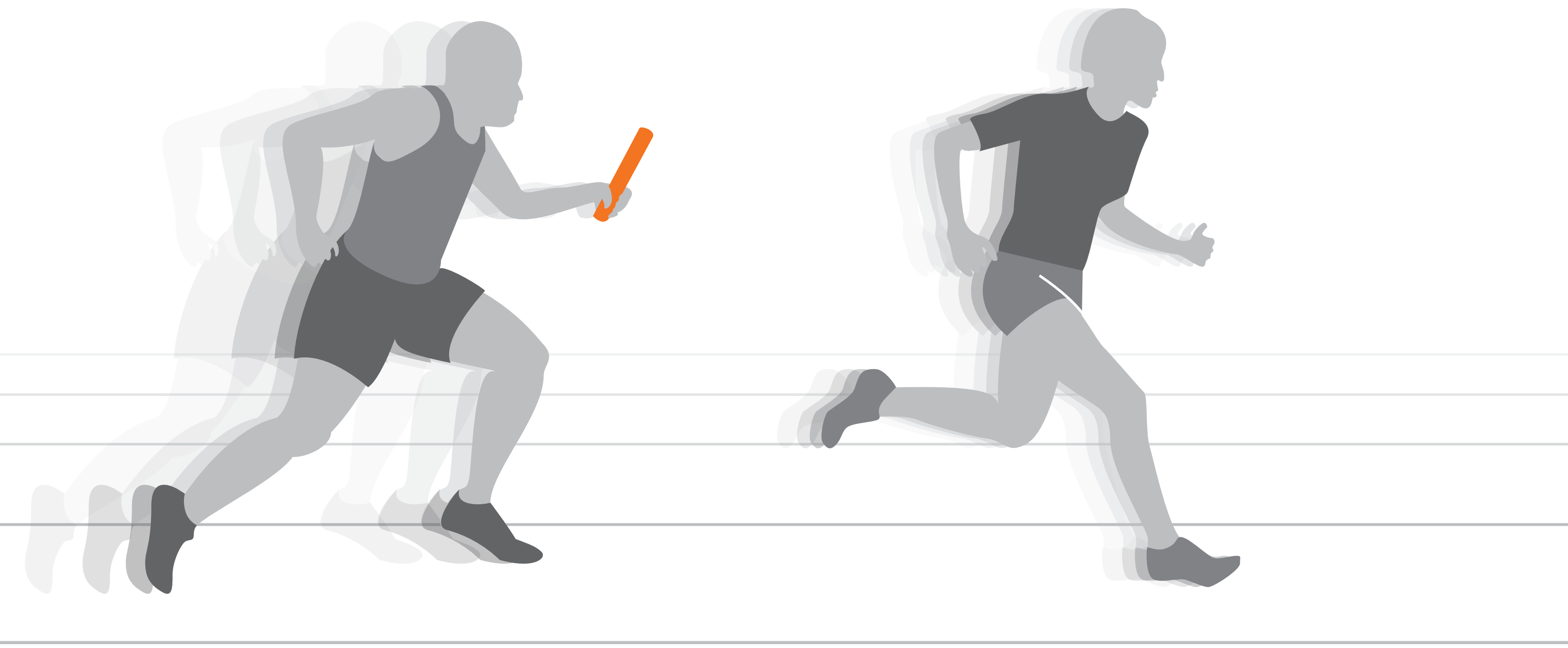

Smooth Hand-Offs from Capture to Contract

By Jay Herther, AF.APMP

Keeping the same core team together is the best way to integrate effort and maximize communication across the entire business development to proposal development to program execution opportunity. Since this often does not happen, the next best approach is to make sure critical knowledge is transferred and plans are maintained when personnel change during two key transitions.

Transitions Are Where the Fumbles Occur

The Gregory Garrett/Reginald Kipke lifecycle model for capture management is a useful framework that spans the spectrum from early pursuit to contract fulfillment. In this model, important transitions occur between the Pre-Bid Phase and the Bid Phase (First Transition) and the Bid Phase and Post-Bid Phase (Second Transition). Dramatic change can occur during these transitions. People, roles, and process steps often change at these points, creating two chasms that must be crossed. Just like an Olympic runner in the 4x100 meter relay race, the hand-off of the baton between these phases is critical. Dropping the baton moves your team into last place. Using the techniques shown in Figure 1 and discussed below can result in a win that meets the profit (or loss) goals approved in your pricing review and become a referenced account in future Past Performance volumes.

Case Study #1—Business Development to Proposal Team Fumble

One company had a salesperson with an understanding of the customer's implicit needs and hot buttons. However, this individual was not collocated with the proposal team. The Solution Architect virtually ignored the salesperson's insights/inputs when designing the baseline solution. During the hectic RFP response, the proposal team referred only to the RFP and did not integrate any of the salesperson's insights. This group failed to share the critical information, which meant that the solution was open-loop rather than customer-steered. The result was a devastating loss.

The First Transition: From Pre–Bid to Bid (Business Development Capture Team to Proposal Team)

During a 2008 APMP panel discussion, Bill Brigadier of Brigadier Consulting stated, "You can't have a Blue proposal unless the Capture Manager hands-off a Blue baton." Dropping the baton in a track relay race can move you from a gold medal winner to last place.

This transition of critical customer and competitive information is a significant factor that will have an impact on the probability of winning. To help make these critical transitions, your team can use any and all of the tools and techniques described below.

Goldstein and Hill have argued that the Bottom Line Up Front (BLUF) approach's "quality capture phase products increase proposal efficiency" and your likelihood of winning. Conversely, "poor capture products result in wasted time and money… and inefficient, weaker proposals:

- Poor understanding of what the customer really wants
- Weak proposal planning
- Late freezing of offerings
- Significant redo… while a marching proposal army is spending Bid and Proposal (B&P) funds
- Inadequate review drafts
- Very tight schedule to complete and deliver proposal…"

The proposal phase is the time to tell a winning story. The capture team must set the foundation for the proposal storyline, including strategy, themes, and firm baselines. If the capture team did not complete this mission or if it does not properly hand it off, then chaos will ensue. This chaos will require significant rework while the people responsible for writing and costing the proposal are waiting for clear direction.

Often there is a rocky transition from the capture team to the proposal team. The classic syndrome is "throwing it over the wall." Another powerful analogy is that the capture team drops off the film and expects the proposal team to develop a winner in 24 hours.

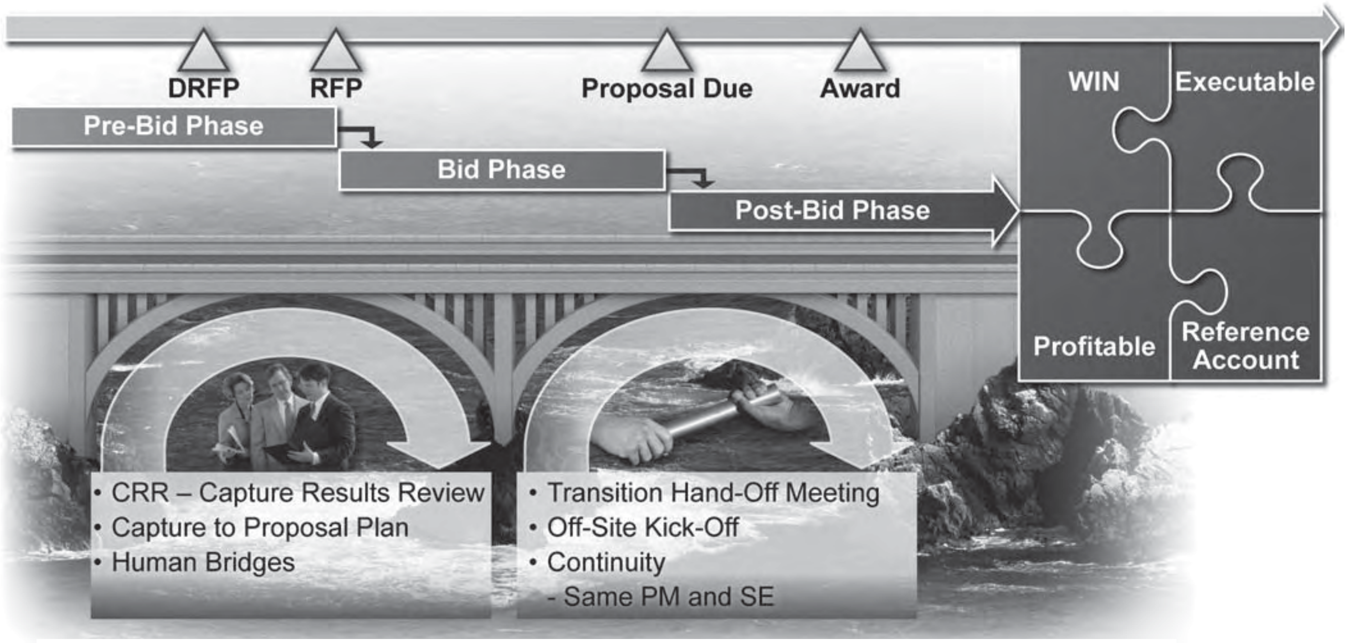

Figure 1. Techniques to cross the two chasms to the Winner's Circle.

In an APMP briefing, John Ballard clearly spelled out some of the hand-off issues. Typically, the capture manager is more outwardly focused on the customer, competitors, and solution, whereas the proposal manager is more inward focused on the proposal strategy, development, and execution. He stated, "We focus on this handoff because it can be the most difficult of all. Stress, pressure, fast paced action all conspire to make this relationship critical."

> We focus on this handoff because it can be the most difficult of all. Stress, pressure, fast paced action all conspire to make this relationship critical.

This transition is never neatly defined, and there should be some overlap to smooth the hand-off—much like the times when both runners have their hands on the baton. Ballard defines this as the Murky Middle (or Danger Zone) and provides a watch list of what can go wrong:

- It is hard for capture managers to relinquish tactical control
- It is hard for proposal managers to take only tactical control
- The capture manager hands it off, never to be heard from again
- Proposal managers are sporadic in their support of capture efforts
- The capture manager and proposal manager do not watch the interfaces:
  - Processes
  - Responsibilities
  - Individuals.

There are three simple ways to help maximize this information transfer and avoid the dreaded baton fumble.

1. Build human bridges:
   - Bring downstream people **UPSTREAM**. For example, bring the proposal manager into the process earlier. Techniques such as selecting and inviting the proposal manager to early bid/no bid and capture plan reviews work well. Also, copy the proposal manager on customer trip/customer reports.

- Move upstream people **DOWNSTREAM.** For example, the capture manager and solution engineer must move onto the proposal team. To hand off the data, the capture manager should generate a draft of the Executive Summary, and the Business Development (BD) lead needs to pass along detailed customer profiles, hot buttons, fears, hopes, biases, a detailed competitive assessment, and the Price-to-Win (PTW).
- Rotate assignments to help others appreciate different functional roles.

2. Map the capture plan into the proposal plan. The heart of the capture plan is transitioned into the foundation of the proposal plan, and later the proposal plan is augmented (see Figure 7).
3. Hold a Capture Results Review (CRR). As the RFP approaches, the most important item is to share brutal truths about the capture effort results. Hold a CRR with the core proposal leadership team. Figure 2 summarizes CRR results, which should include influence (did we shape the RFP?), level of customer intimacy, and relative positioning with respect to the competitors. The ultimate result is how well the capture team shaped the positioning to win by matching the customer hot buttons with the stated evaluation criteria.

Over-communicate with daily stand-ups, cc: others on informational emails, and be collocated in a War Room.

Applying Communication Theory

Technical information needed for complex technical proposals is usually not transferred effectively via reports. To effectively transfer this information, it is important to recognize and encourage Technological Gatekeepers, people who are high technical performers when it comes to organizing and disseminating information. These people often work through informal verbal communications. As Allen points out, "the probability of communication decreases with distance. The probability of weekly communications reaches a low asymptotic level within 25 to 30 meters." Lee and Zwerman concur: "Getting the right information to the right place in time can be a serious problem. This is particularly true for information that must move horizontally or diagonally. The reduction of information exchange is partly determined by personal self-interest and interdepartmental conflict."

Oftentimes, people believe that information is power, and do not share across all proposal disciplines. As Lee and Zwerman point out, "while information hoarding may be functional to departmental status, it is dysfunctional to organizational effectiveness." So, the message is to "over-communicate with daily stand-ups, cc: others on informational emails, and be collocated in a War Room."

Case Study #2—New Kids on the Block

The proposal team worked tirelessly and submitted a winning proposal. Four months later, we received the great news that we won. Unfortunately, the proposal manager and solution engineer who worked on the proposal are now on another program. So we assigned a new team whose only core competency was availability. This team was unfamiliar with the assumptions and essentially started anew to rebid the job. They entered a cycle where they were continually replanning the program. This led to inefficiency, which delayed the program start and led to cost overruns.

CRR—Capture Results Review *(example)*

Category	Objective	Description	Grade
1) Influence	• Shape the requirements	• They added two obectives (A and B) that we can meet • They changed X and Y, so we are now compliant	Satisfactory
2) Customer Rapport	• Execute our customer meeting plan	• We met with the Program Office twice but failed to meet with endusers	Marginal
3) Competitive Landscape	• Position to win better than our competitors	• Competitor A teamed with the best choice for Subsystem X	Marginal
		• We were surprised when Competitor B had the spec changed in their favor	Unsatisfactory
4) Solution Match	• Review trade-offs with customer	• Customer voiced strong opinions on several important decisions	Satisfactory
5) Evalutation Criteria	• Emphasize past performance	• Customer increased weighting factor from 10% to 25%	Excellent

Figure 2. Hold a CRR, and focus on the candid results from the capture phase.

In *The Starfish and the Spider*, Brafman argues that spiders have a rigid hierarchy and top-down leadership, and revolutionary starfish rely on the power of peer relationships. "Instead of having a head like a spider, the starfish functions as a decentralized network." Of course, we need strong capture leadership and proposal management, but the point is that the communications are enhanced by using a peer network of networks. Alcoholics Anonymous (AA) is a starfish decentralized organization; "At AA, no one's in charge. And yet, at the same time, everyone's in charge." In the proposal world, especially during transitions, communications flowing across starfish organizations ensure that the right information is available to the right personnel at the right times to complete proposal assignments. Unlike the old-school style of vertical, stove-piped communications up a company's functional chains of command, the starfish organization spreads power and knowledge across all team members.

Unlike the old school style of vertical, stove-piped communications up a company's functional chains of command, the starfish organization spreads power and knowledge across all team members.

The Google, Inc. organization is a good example of a network that enhances the effective horizontal flow of information. "The lateral flow of communications within the company is even denser than the vertical flow," says Hamel. At Google, several mechanisms knit teams together. First is the Misc List, an ever-changing smorgasbord of ideas and comments that is open to every team member. Second is a Web Page of threaded topics that fosters communication. Third is Snippets, a site of weekly posts of personal actions and accomplishments. Any Googler can search the Snippets to keep abreast of what is happening. Fourth is TGIF, weekly all-hands in the Googleplex Café to share information and lead an open-mike Q&A session. These four techniques can smooth the transitions, lead to team-wide transparency, and support continuous peer-to-peer feedback.

The Second Transition: From Bid to Post–Bid (Proposal Team to Program Execution Team)

The second critical hand-off is when the proposal team makes the transition to the executing program team. This hand-off is crucial for rapid program start, and results in an executable program.

The key to this transition is to identify and assign the executing program (or project) manager (PM) during the proposal phase. Beveridge notes the risk of not assigning a PM during the proposal phase and letting the proposal manager assume that role. "He is tentative, he is not fully committed because there is no risk/reward payoff. So he takes the middle of the road – a nice comfortable path to a loss. Another flaw is picking the PM at the last minute, just prior to submittal." PMs must know early that they will be accountable for program execution so they have a strong vested interest.

A strong PM should create a backstop and counterforce to offset the competitive win adrenalin.

The PM should lead the proposal's Management Volume and drive to an executable program plan, including an Integrated Master Schedule/Integrated Master Plan (IMS/IMP) and a Risk Management/Mitigation Plan. A strong PM should create a backstop and counterforce to offset the competitive win adrenalin. This creates the required creative conflict tug of war, resulting in a proposal that is both winnable and executable. Most customers expect the executing PM to show up at the orals briefing and have a strong handle on the program specifics, as well as know how to mitigate the risk of failures. Figure 3 shows how the PM contributes to an executable program that meets both the customer's needs and company's financials.

Again, it is best to assume reading documents is not the best way to transfer critical information, and that building human bridges and face-to-face

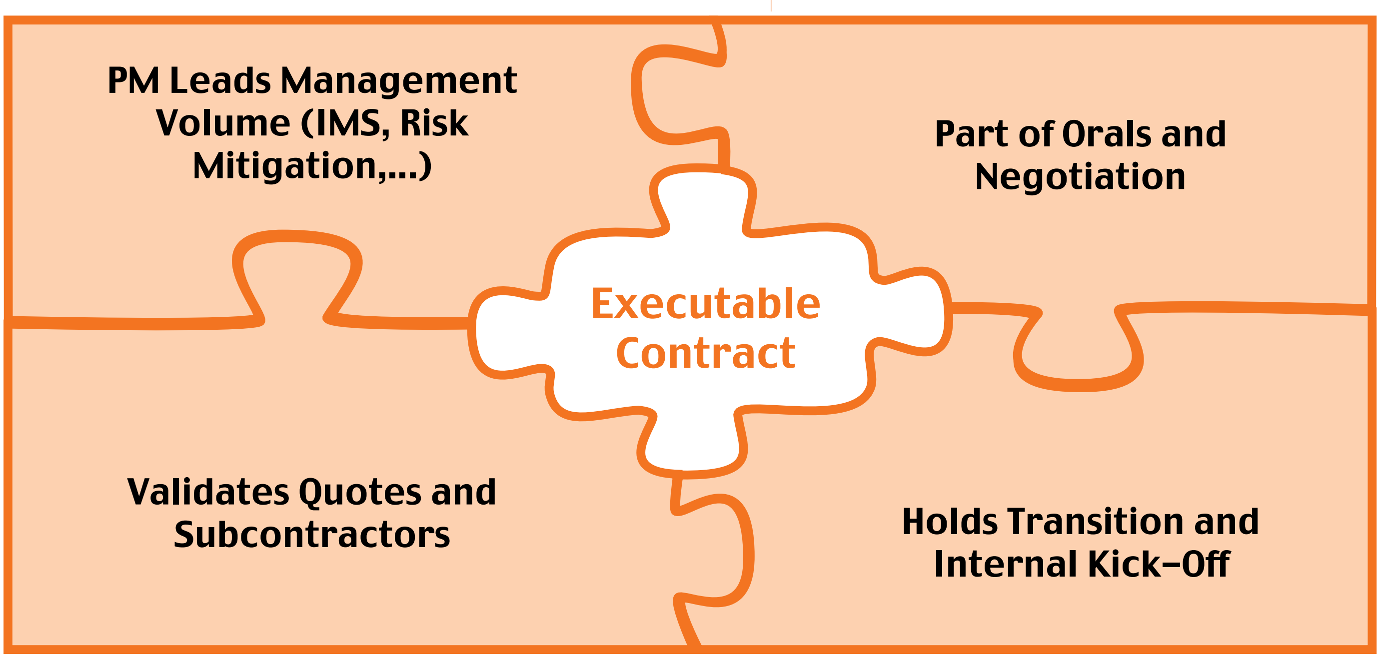

Figure 3. Bring in the executing PM before the proposal is submitted—not after the win!

Category	Item	Risk	Recovery Plan
1) Technical	• Spec compliance	Low	
2) Schedule	• Long lead	Low	Order at Preliminary Design Review (PDR)
3) Infrastructure	• Short of test equipment	Medium	Order Capital by 45-days ARO
4) Cost	• Baseline cost	Low	
	• Option for Subsystem X	High	Negotiate with supplier and go out for addition bids
5) Resources	• Staffing for Mechanical Engineering (ME) Ramp	Medium	Hire TBD MEs or outsource

Key Assumptions Watchlist

1. **Customer is providing GFE**
2. **Specification will be approved within 30 days**
3. **Manufacturing will work 3 shifts**

Figure 4. Hold a transition meeting after the win to jump-start the implementation contract fulfillment team

hand-offs are more effective. Having the PM on the proposal team is only one key to smoothing the transition. Because many program team members will be new to the project, another key is for the proposal team to meet with the core program team at a formal transition meeting that covers the topics summarized in Figure 4. This technique is far more effective than just reading the proposal, since the team can explain the reasons behind the proposed approach. At this transition meeting, it is useful to review the Risks and Opportunities Management Plan (ROMP). The ROMP provides a watchlist of items to mitigate and ways the program team can save schedule time or reduce costs, and thus build a management reserve for known/unknown issues.

The ROMP provides a watchlist of items to mitigate and ways the program team can save schedule time or reduce costs, and thus build a management reserve for known/unknown issues.

Another effective step is to have an internal, off-site program kick-off meeting. The purposes are to update everyone, reach agreement on the detailed program plan, and build trust and teamwork. Some core players from the proposal team and teammates/major subcontractors should also attend to maintain continuity, and ensure consensus across the entire program execution team.

The Team Grows and Changes Over Time

In smaller pursuits, a single person can play multiple roles. However, over time on large efforts, the team grows from one BD/salesperson who identifies and qualifies an opportunity to a Core-5 team. Figure 5 shows how such a team expands.

As the right people and functions are added to the team, the structure and organization construct changes over time. Figure 6 shows the progression from a Core-3 capture team to a proposal team to a program team. As a proposal team is created, it is organized around end products. To have clear accountability, captains or book bosses are assigned for each major deliverable. Similarly, the program organization is designed around

Integrated Product Teams (IPTs), which are multi-functional teams focused on a specific product.

As a living document, the original capture plan is updated and developed into the proposal plan (Figure 7). A well-orchestrated proposal results in a detailed program plan. If that plan changes radically without customer redirection, then either B&P or program funds will be depleted by unnecessary rework.

Top Five Diseases and Cures

There must be smooth transitions across the two lifecycle discontinuities from Pre-Bid to Bid (the capture phase to the proposal team) and from Bid to Post-Bid (the proposal team to the program team). Within each transition, proposal professionals should be aware of the top five diseases and the best ways to cure them, as outlined below:

1. Customer Intel Never Reaches the Proposal Team
- Cure: BD/sales transfer intel using the following mechanisms:
  - Theme Tree
  - Draft Executive Summary
  - Attend daily stand-ups/reviews
  - Big font messages on the War Room wall.
2. Wholesale Change of the Big 3—No Continuity
- Cure: Transition the program manager and solution engineer to execute the program.
3. New Team Reproposes Job After Contract Award: Often this is due to the Not-Invented-Here (NIH) syndrome, whereby the new program team ignores the earlier proposal team's work and redefines the approach.
- Cure: Transition meeting.

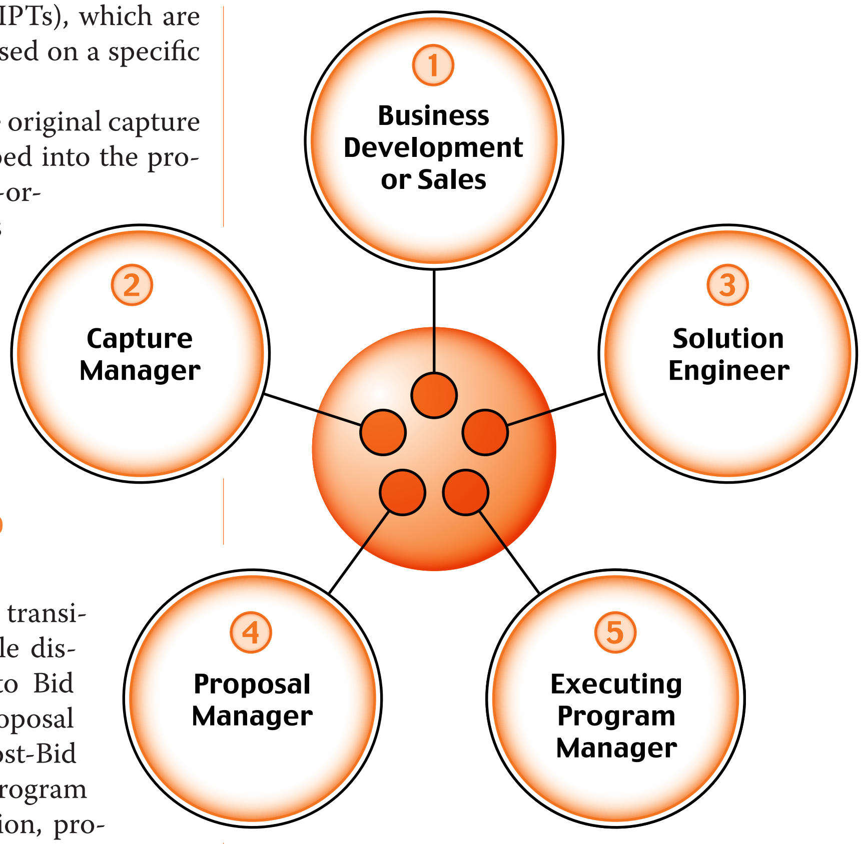

Figure 5. Start with a small Core-3 team and then grow to the Big 5 over time.

4. Imbalanced Emphasis on Either Winning or Executing: Too much focus on executing and a PM-lead capture team can be overly conservative with too much margin/reserve resulting in a loss. Conversely, if BD/Sales are too powerful and are only incentivized on winning the order, the program execution will likely suffer and this will hurt your Past Performance score for future competitions.
- Cure: Assign the PM and solution engineer during the proposal and make it clear that they will own and be accountable for program execution.
5. Program Plan Radically Different Than Proposal Plan
- Cure: Complete the program plan during the proposal phase, and update based on Evaluation Notices, Final Proposal Revision, and changes during negotiation.

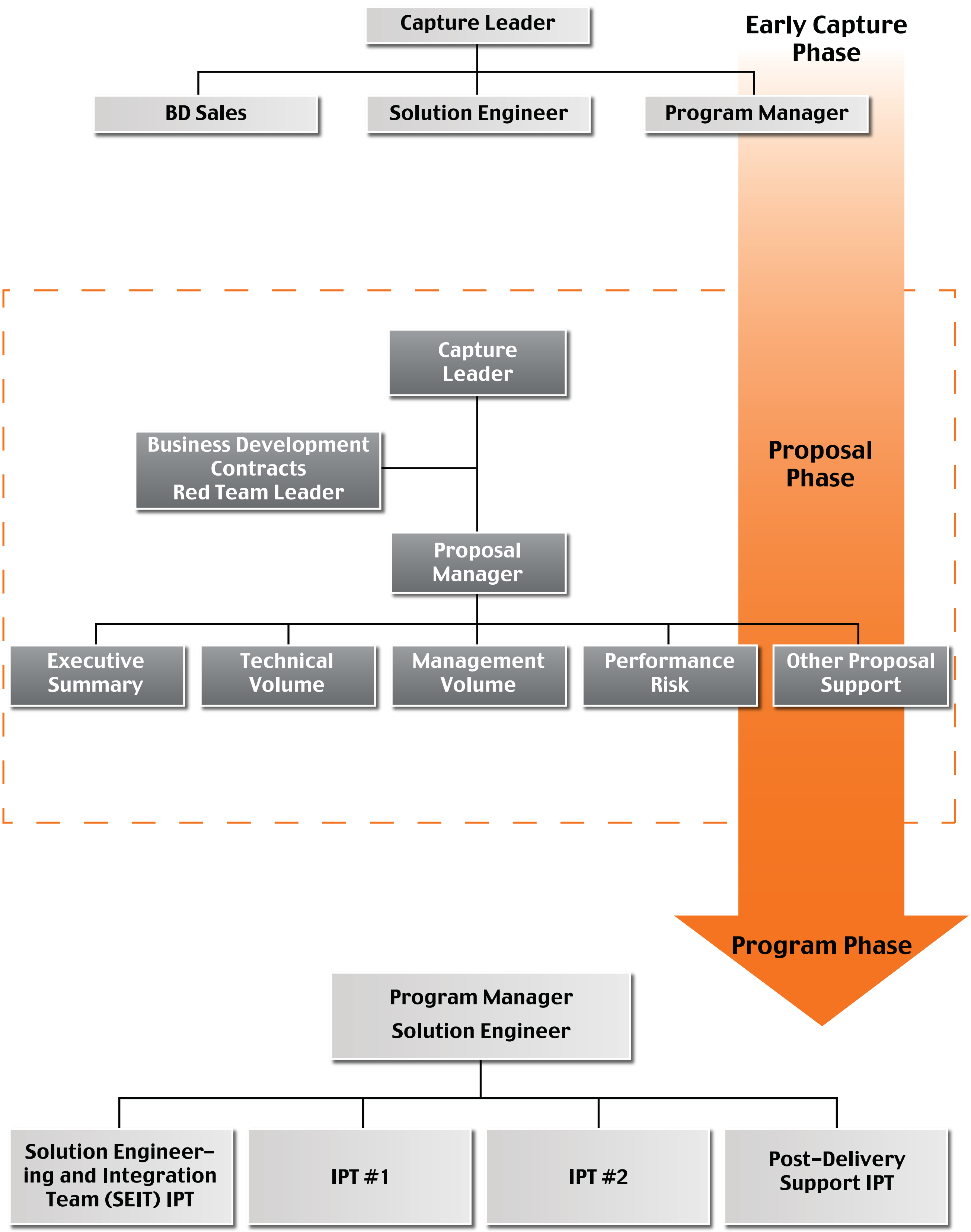

Figure 6. The team morphs and grows over time.

If you follow these techniques, you will be able to hand-off the baton from a Blue capture process to achieve a Blue (Outstanding) winning proposal, and then go to the final step of an executable program that has a high probability of being Green (meeting both customer needs and business financial metrics).

Think of an Olympic track event. In a two-minute race, the difference between a gold and silver medal can be one-hundredth of a second. Can you afford to have a glitch and lose during the hand-offs?

This article reflects the personal opinions of Jay Herther, who accepts all responsibility for the content and accuracy of the information contained in the article and compliance with copyright laws. The article is not a statement on behalf of BAE Systems and does not necessarily reflect the opinion or practices of BAE Systems.

In a two-minute race, the difference between a gold and silver medal can be one-hundredth of a second.

Can you afford to have a glitch and lose during the hand-offs?

Figure 7. The capture plan is the basis for the proposal plan that is the basis for the program plan.

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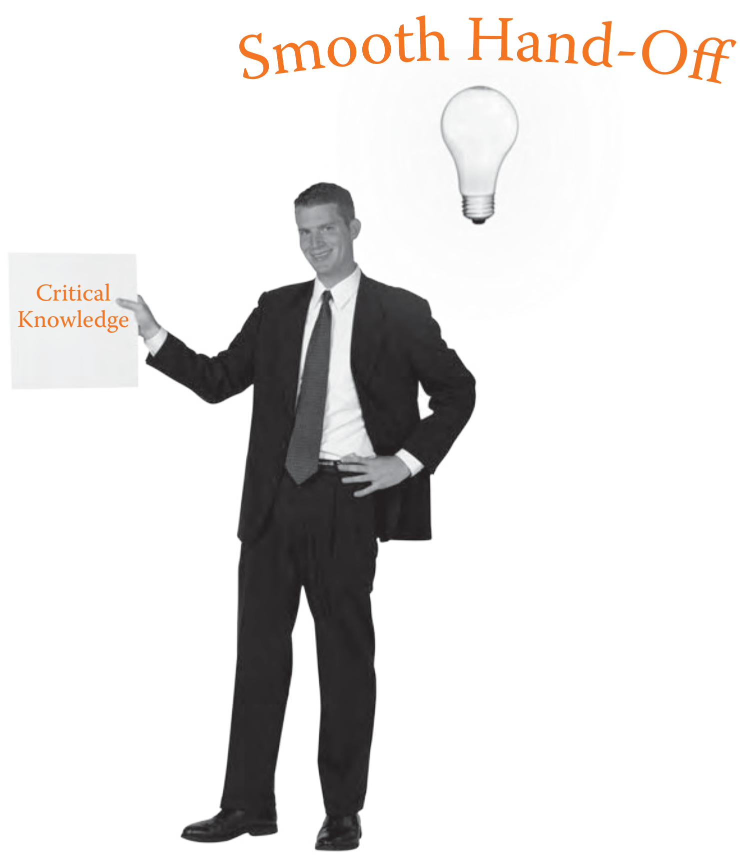


Jay Herther, AF.APMP, has more than 20 years' experience leading capture teams, achieving a 78 percent win rate totaling more than $10B. He is the author of four *APMP Journal* and three *APMP Perspective* articles. He is an active member of the APMP Nor'easters Chapter and has presented at many national conferences and other forums. In 2007, Mr. Herther received the APMP Insight Award, and he was awarded an APMP Fellows Award in 2008. He can be contacted at Herther3@comcast.net.

The Clothes That Words Wear

Evolving Communications Technology is Driving Proposal Typography and Formatting

By Mitch Boretz, AF.APMP and Colleen Jolly, AM.APMP

Proposal submission and review are migrating from paper to the computer screen, and this has serious implications for how proposal professionals should format documents for easy readability.

Introduction: Migration from Paper to the Screen

Ten years ago, color pictures were rare in proposals. Ten years from now, moving pictures will be common as we migrate to what proposal consultant and APMP Fellow David Pugh calls "proposaltainment" (Pugh, 2008). But even as we evolve to a "paperless" proposal environment that takes advantage of everything the digital world has to offer, most of us are technological laggards in the fundamental aspect of our jobs: putting the words on the page. We are using layouts that are centuries old, and typefaces that are decades old. We are working in what amounts to a new electronic medium using the same tools that Gutenberg had in the 1400s, on pages whose dimensions were set in the 1600s.

Online proposal submission saves us from days of kneeling before the copier in furtive prayer, and nights of racing to the overnight shipping depot at the airport. But it has brought us new challenges in formatting and submission. Proposal managers now are asked to meet maximum targets for file size rather than page count—and those with better command of file optimization may get more pages or more pizzazz than their competitors. We sometimes must upload proposals in plain text only. Other customers require Microsoft® PowerPoint presentations, with hardly a complete sentence to be seen. Some want Microsoft Excel files so they can manipulate the numbers in the budget on their own.

One of the most important issues, however, is one that we tend to overlook: what font and layout to use when preparing a proposal for online submission and review? Reading a document on a computer screen is a qualitatively different experience from reading it on paper. The choices that we make in page structure and typography can have a significant impact on the reader's experience. It would be an overstatement to suggest that the fonts we use can determine whether a proposal succeeds or fails—but it is certainly appropriate to say that a comfortable reviewer is a happy reviewer, and a happy reviewer is more favorably disposed toward a proposal that was easy to read. In fact, reviewers in the Secure Border Initiative proposal cited easy-to-understand visuals and typography as an element in their award decision: Greg Giddens, Executive Director of the US Customs and Border Protection Secure Border Initiative (SBInet) Program Management Office (and part of the SBInet decision-making team) told APMP National Capitol Area members at the November 2007 meeting: "Visuals help tell the presenter's story." In addition, he said that graphics give evaluators a break because after reading several proposals "200 pages of text begin to look like ants." Giddens went on to say, "We went to the graphics and captions for the answers to our questions. If we found the answer, we didn't bother reading the text."

Some US Government agencies already are mandating new typography requirements for proposals that are to be submitted and reviewed online. However, their rules are based on assumptions and sketchy literature on readability. In this article, we review the differences between online and on-paper reading, we discuss what makes a readable presentation for the screen, and we make recommendations about how to go forward into this genuinely new medium.

Some US Government agencies already are mandating new typography requirements for proposals that are to be submitted and reviewed online.

Lost in Pixellation

The US National Science Foundation (NSF) was one of the world's great innovators in online proposal submission, but perhaps one of the clumsier agencies in recognizing the differences between screen and page. NSF decided in 1993 to develop a proposal submission system that would make use of the nascent World Wide Web, and within a few years the Fastlane system was born. The system allows multiple members of a project team to upload proposal components, which it stitches together into a single PDF file.

Authorized representatives (those with signing authority) at user organizations control access to Fastlane, and individual principal investigators (the academic equivalent of a project director) control access to their proposals by co-authors and staff.

The basic elements uploaded to Fastlane are

- Cover page
- 1-page summary
- 15-page project description
- Bibliography
- Budget forms
- Budget justification
- Biographical sketches of key personnel
- Summary of key personnel current and pending support
- A description of relevant facilities and equipment.

Any authorized user can upload any of these files in any order. Authorized users also can delete and replace files and modify the budget. When everything is complete, the principal investigator releases the proposal for submission, and the authorized representative of the institution, usually someone from the contracts and grants office, electronically “signs” the proposal and transmits it to NSF.

By 2000, NSF required that all proposals be submitted via Fastlane, and it had integrated an entire project management system so all progress reports, notifications, and requests would be paperless as well. NSF reports that Fastlane handled nearly 47,000 proposals in 2007, up from 25,000 in 1995. Compared with online proposal systems such as Grants.gov, the Department of Energy Industry Interactive Procurement System (IIPS), NASA’s SYS-EFUS (an acronym for the different classes of NASA research projects and a nod to the Sisyphean nature of our business), and the US Department of Education online submission system, Fastlane is a gem.

However, the NSF’s experience with driving new formatting standards for online proposals has been less impressive. Not until 2007 did NSF revise its standards for proposal formatting. The first revision lasted a little less than six months before a second set of standards arrived (Figure 1). There is some progress from the self-contradictory

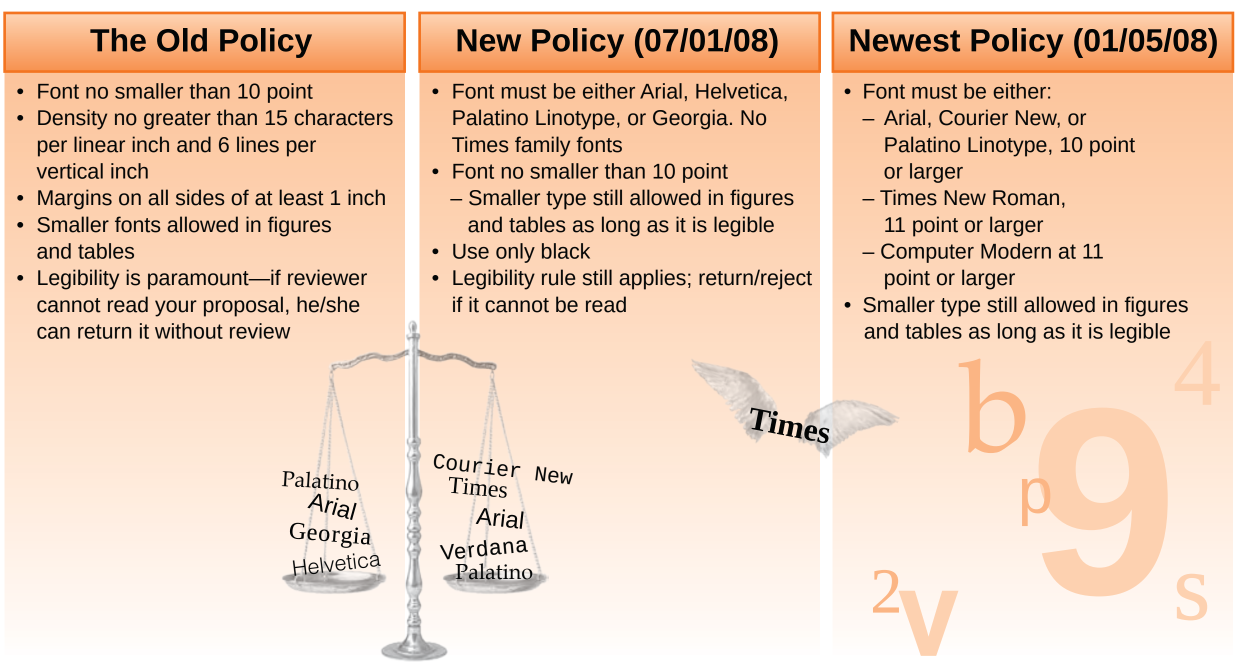


Figure 1. Side-by-side overview of the old, new, and newest policies of the NSF.

formatting rules that existed before, but NSF still has some distance to travel before its requirements reflect our best knowledge of on-screen presentation.

The old NSF requirements were somewhat byzantine. A proposal could be no more than 15 pages (8.5 by 11 inches, single-spaced, with 1-inch margins, and single-sided back in the paper days), using a font no smaller than 10 point. Type density could be no more than 15 characters per linear inch, and no more than six lines per vertical inch. It sounds simple until you try to apply the rules. Times New Roman 10 point, for example, generally yields 17 to 18 characters per linear inch, and 7 lines per vertical inch. Will a single line with more than 15 characters disqualify an entire proposal, or does NSF mean that the average density should not exceed 15? And what is a character, anyway? Do spaces count?

Even the definition of an inch can be subject to debate. Since NSF encourages the use of metric measurements, an inch is 2.54 centimeters, which rounds to 2.5 centimeters. If we set our margins to 2.5 cm rather than 1 inch, we get an extra 8 millimeters per line to work with—a fact that one principal investigator insisted on exploiting in a proposal that one of us (Boretz) worked on. Finally, the guidelines did not specify when the measurements are made. Fastlane allows a user to upload a Word file, which is automatically converted to Adobe Acrobat PDF. Some shrinkage occurs when this happens in Fastlane—the type gets a little smaller, the margins a little wider. So it was theoretically possible to submit a proposal that complied with all formatting requirements in Word but failed as a PDF.

NSF will not say, but the vagueness of the old guidelines was probably intentional. Peer reviewers on NSF proposals are volunteers; if reading a proposal is torture, they will not volunteer for more. On the other hand, NSF does not want to reject proposals on administrative grounds, either. Self-contradictory guidelines give NSF program managers the discretion they need to go ahead with borderline proposals and, when necessary, kick out the non-compliant ones.

Mitch Boretz prepares scores of NSF proposals every year, and only once has he been threatened with having a proposal returned without review because of typography. The program manager spot-checked the last line of the first page and found 19 characters in the first inch—because the first word was "illustrative," full of pencil-thin i's and l's in 11-point Times New Roman. The program officer offered the opportunity to take back the proposal and reformat it. We declined. It went forward to the reviewers as submitted. On a different proposal, which was written in 10-point Times New Roman, a peer-reviewer commented: "[Proposer] should spend more effort on compressing his ideas and less on compressing the type size." But that proposal was recommended for funding.

By 2000, NSF required that all proposals be submitted via Fastlane, and it had integrated an entire project management system so all progress reports, notifications, and requests would be paperless as well.

In 2007, NSF made dramatic changes to its formatting requirements. Starting in July, proposals were required to meet the following standards:

- Font must be Arial, Helvetica, Palatino Linotype, or Georgia; notably, Times-family fonts were banned
- Font must be no smaller than 10 point; smaller type was allowed in figures and tables as long as it is legible
- Text must be in black
- Proposals can be rejected without review if the reader does not consider it to be legible.

The loss of Times New Roman, an old stand-by of the ink-on-paper era, was a shock. At the University of California, Riverside, most of the authors switched to Arial 11 point, the same font that the National Institutes for Health generally requires. A few chose to use Georgia. Interestingly, a review of proposals from the second half of 2007, when these typography rules were in effect, showed that only one proposal submitted in Georgia was selected for funding.

The new NSF rules lasted only until January 2008, when the agency implemented an even simpler set of requirements. Today, fonts must be either:

- Arial, Courier New, or Palatino Linotype, 10 point or larger
- Times New Roman, 11 point or larger
- Computer Modern, 11 point or larger.

Smaller type is still allowed in figures and tables as long as it is legible: A peer reviewer who cannot read a proposal can give it a zero, and send it back.

Interestingly, no fonts in the latest NSF policy were designed for on-screen legibility. Georgia, one of the mid-2007 body types, was specifically designed to be easy to read on the screen, as we discuss below. But NSF deleted it from the approved list. Times New Roman and Arial were designed for print and can be blurry on the screen. On some monitors, 10-point Palatino is almost impossible to read; even 11-point is trouble. (Courier, a mono-spaced font that looks like something from old typewriters, is allowed mainly because it is traditionally used to represent coding in computer science proposals, articles, and books. Mono-spaced fonts, where every character is the same width, are seldom used for body type.)

So what is wrong with the NSF initiative? It comes down to pixels. A decent laser printer lays down 600 to 1,200 dots per inch. A computer screen renders only about 72 pixels in the same space, and today's best displays are still below 100. In short, the image on the screen is much coarser than the image on paper. This means, for example, that the upper loop in a lower-case "e" in a smallish font could visually appear to fill in—much

like text from a typewriter with dirty keys, for those of you with long memories. The lack of resolution slows down the reader, typically by about 30 percent versus paper, and makes slogging through the text more difficult.

Additionally, liquid crystal display (LCD) monitors are much easier to view text on than the previous cathode ray tube (CRT) monitors. LCD screens have a much faster refresh rate/visual response time and use a different method for emitting light than CRTs. The resulting effect is easier on the eyes. Still, imagine a reviewer trying to read your proposal from a laptop screen while bouncing through air pockets on a crowded flight. The reading conditions and the document are not conducive to the favorable frame of mind that we hope our reviewers have when filling in their score sheets, which increasingly also are onscreen.

Typographical designers have responded to the limits of on-screen resolution by devising new fonts optimized for the screen, such as Verdana and Georgia (see Figure 2). In general, the characters in these fonts have bigger loops in the letters, so there is less risk that poor screen resolution will cause them to visually appear to fill in. This, in turn, implies a greater "x-height" for the typeface—the space between the baseline and the tops of lower-case letters. Since the letters are essentially taller, typographers also must make them wider so they do not look squished—and this is where the proposal writer has a problem. A nice, readable on-screen font is a fatter font. You get fewer characters per line with Georgia than you do with Times New Roman; fewer with Verdana than with Arial. In a page-constrained proposal, choosing a highly readable font means choosing to tell your story in fewer words.

Even worse, the proposal manager cannot be confident that the investment (or sacrifice) in a more readable font pays off in a more readable document. For help in making that decision, consider the following.

A pica is 12 points, and a rule of thumb for the printed page is that the column should be 1.5 picas wide per point of type.

Beyond Bigger Loops: The Science of Readability

On paper or on the screen, a fundamental fact of legibility is that type is difficult to read if it is too large or too small. In either medium, body type should be in the range of 10 to 12 points. A point is 1/72 inch, so 12 points is 1/6 inch, measured from the bottom of the baseline to the top of a capital letter (see Sidebar 1, *Anatomy of a Font*).

A pica is 12 points, and a rule of thumb for the printed page is that the column should be 1.5 picas wide per point of type. In other words, 12-point type is easiest to read on an 18-pica line. Check any newspaper for an example: Usually, you will see 9-point or 10-point type in six 15-pica columns, with 1-pica "gutter" between columns. On an 8.5 by 11 page, these proportions imply that an ideal portrait layout would be two columns, each 3 inches wide (18 picas), with a little more than a pica gutter between the columns.

Longer lines can lead to eye and neck fatigue because the reader must move the head, not just the eyes, to get from one end of the column to another. Shorter lines, in which the eye is constantly jumping to the next line, disrupt concentration and the flow of sentences. Readers are like Goldilocks—we need a line length that is neither too short nor too long. But no set metrics tells us exactly what this number is for every document and layout.

The computer screen, at least in theory, takes us away from our traditional moorings in pages, orientations, and point sizes. A few studies, of varying quality and conclusiveness, have been conducted since the mid-1990s, but overall understanding of how people read on the screen is still poor.

A study at Illinois State University (Weisenmiller, 1999) asked subjects to read passages in Georgia, Verdana, Times, and Arial on the screen and on paper to

Font	Size	Characters per inch	Notes
Times New Roman	10 point	The cow jumped	Classic font designed for print.
	11 point	The cow jumpe	
	12 point	The cow jump	
Georgia	10 point	The cow jumpe	Screen-friendly font with large x-height. Interestingly, the baseline shifts for the numerals 3, 4, 5, 7, and 9: 1234567890. This makes some constructions, such as chemical notations, problematic. Compare the subscripts H_2O and CH_4, for example: The 2 does not descend below the baseline at all, and the 4 descends so far that its foot can be cut off.
	11 point	The cow jump	
	12 point	The cow jum	
Arial	10 point	The cow jumpe	Originally used by Microsoft as part of the 1992 Windows operating system. It has become the most widely used and distributed typeface in the world.
	11 point	The cow jump	
	12 point	The cow jum	
Helvetica	10 point	The cow jumpe	Similar to Arial in overall look, but each character differs slightly. For instance, the top of the lower case t is straight where Arial's t is angled. Overall this font offers a slightly more professional impression than Arial and still maintains its onscreen readability.
	11 point	The cow jump	
	12 point	The cow jum	
Verdana	10 point	The cow jum	Font designed for the screen and popular in Websites, including the APMP Website.
	11 point	The cow ju	
	12 point	The cow ju	
Palatino Linotype	10 point	The cow jumpe	Stylish and dignified, but sometimes difficult to read on the screen.
	11 point	The cow jump	
	12 point	The cow jum	
Courier	10 point	The cow jum	Mono-spaced font (i.e., every character is the same width). Commonly used for representing computer code in documents.
	11 point	The cow ju	
	12 point	The cow j	

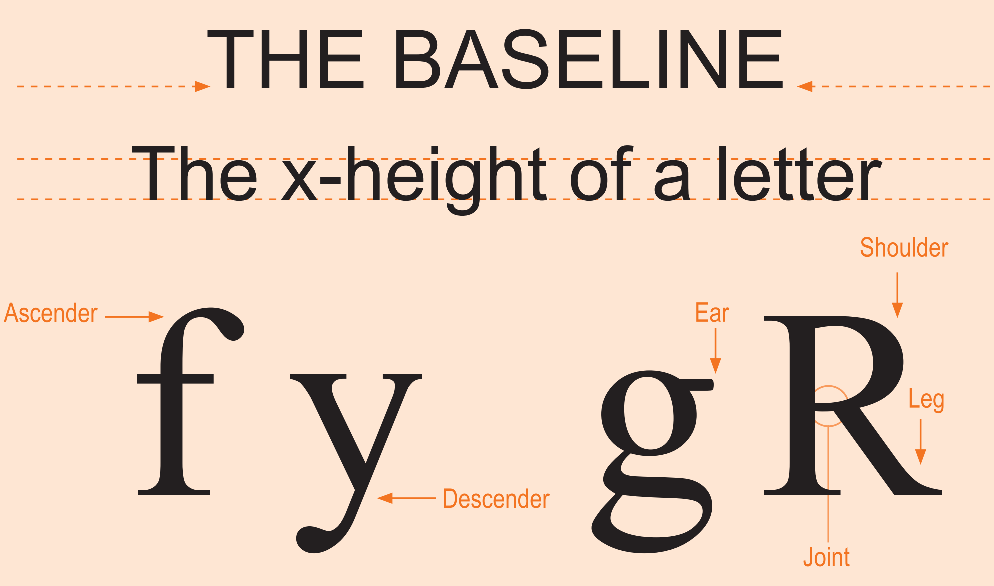
Figure 2. Typefaces designed for the screen generally have larger "x-height" (the space from the baseline to the top of lower-case letters) and larger loops than typefaces designed for the printed page. The price of increased legibility is increased size. Fonts such as Verdana and Georgia allow fewer characters per line than their printed counterparts, such as Arial and Times, respectively.

Anatomy of a Font

If we think of fonts as the clothes that words wear, we extend the analogy by thinking and speaking of a letter as having an anatomy—arms, legs, and feet.

Here are essential terms to know when discussing fonts:

- **X-height:** The distance between the baseline of a line of the type and the tops of the main body of lower case letters (excluding ascenders and descenders). The x-height is a factor in typeface identification and readability.
- **Ascender:** The upward vertical stem on some lowercase letter, such as h and b, that extends above the x-height.
- **Descender:** The portion of some lowercase letters, such as g and y, that extend or descend below the baseline.
- **Typography:** The arrangement and selection of faces of type, sizes, and spacing on the printed page.
- **Font:** All the letters, punctuation, marks, and numerals in the same point size in a particular type style.
- **Typeface:** A family of letters using the same design motif, but varying in style, width, weight, and texture.
- **Type Family:** Each single typeface has variations that include different widths, weights, italics, and styles.



Times New Roman	Georgia	Arial	Verdana
a e i o u A E I O U	a e i o u A E I O U	a e i o u A E I O U	a e i o u A E I O U

Figure 3. X-height affects the perception of font size. All the letters above are in the same font size (14 point), but some appear to be much larger because of the height and width of the lower-case letters.

determine whether sans serif and serif typefaces optimized for on-screen viewing significantly improve reading rates and reading comprehension. (Serifs are the tiny decorations on the edges of letters in fonts such as Times Roman and Georgia; sans-serif fonts like Arial and Verdana do not have these decorations.) Conventional thinking is that serifs help the eye find the edges of words and the baselines, and are easier and faster to read. Sans-serif fonts are better for very large displays, such as in headings or PowerPoint presentations, and for very small material, such as text inside compact tables, because they print sharply when large and do not blur or blot when small.

Color CRT monitors were just coming into use when this study was performed, and LCD displays were far in the future. Hence, the study focused to some extent on readability of monochrome versus color monitors. The study did not find that Verdana and Georgia improved readability of the passages.

Earlier research (Tullis et al., 1995) not surprisingly found that larger fonts were easiest to read on the screen. Fifteen volunteers (ages 27-45) read passages in a combination of 12 fonts and sizes (48 possible permutations) on a 15-inch monitor. The researchers studied reading time and accuracy, and asked the subjects about their preferences. Very small type (6.0 to 8.25 point) had the poorest reading times and accuracy. Fonts 9 point and larger were much better. Readers preferred the MS Sans Serif font overall, followed by Arial and MS Serif. (Note that the study was conducted before we had Georgia, Verdana, and some other choices.) The largest font size in the study was 9.75 point, and it was the most preferred.

Recent readability research has focused more on Web pages and email than on documents. A study reported in *Web Marketing Today* (Wilson, 2001) indicates that readers overwhelmingly preferred sans-serif fonts for email, and Verdana was the most popular choice. Two-thirds of subjects claimed Verdana at 12 point was too large, while only 14 percent said Arial 12 was too large. This is an example of x-height inflation in action. A font with a larger x-height seems larger than a comparable font of the same size but with a smaller x-height (Figure 3). Overwhelming majorities considered Arial and Verdana 9 point to be too small.

Also in 2001, Bernard et al. from Wichita State University reported that reading time for a two-page passage read on the screen varied by as much as 40 seconds depending on font. Tahoma, Times, and Agency were fast reads; Bradley, Courier, and Corsiva were slower.

When evaluating studies, it is important to look at the technology and the methodology. LCD and plasma displays are relatively new, and the literature does not reflect the reading experience with them. Another question mark is whether the subjects in the studies are representative of the population. Colleges often recruit students to participate in research of this kind. As a result, the results reflect the reading abilities and preferences of young people with relatively good eyesight—a government proposal reviewer who never goes anywhere without two sets of reading glasses might have a distinctly different experience. Finally, comparisons of the same document on the screen versus on paper are not reported.

What Is a Page?

The paper in your printer is 8.5 inches wide and 11 inches tall because Dutchmen in the 1600s were not very wide and not very tall.

The American Forest and Paper Association reports that the standard US paper size dates back to the early days of paper making when the Dutch invented the two-sheet mold. A worker could comfortably reach about 44 inches, so the molds were made that wide. Watermarks and lines were about 8.5 inches wide, and two could be laid side by side. So paper was made in 44-by-17 sheets and then cut into eighths. A standard was born.

When machine-made paper became popular, the format remained the same, so hand-made paper would still have a market. The US adopted a smaller size (8 by 10.5 inches) as a standard around 1921. Even though most agencies migrated back to the business standard (8.5 by 11 inches) over time, the US Government did not officially retire the smaller page until the Reagan administration.

In the rest of the world, where ISO standards are in effect, A4 is the typical business size. A4 is a great-great-grandchild of A0, which is 1 square meter. A1 is half of A0 (the same width, half the height). A2 is half of A1, A3 is half of A2, and A4 is half of A3. Every A-series sheet has the same height-to-width ratio of 1.4142:1.

Real Life Adventures (So Far)

The electronic proposal is not just a paper proposal converted to Adobe Acrobat PDF, although it is often treated that way. On the APMP Commercial news group and at meetings and conferences, we are hearing more about online procurement systems that accept only plain text: no pictures, no boldface, no superscript or subscript for chemical engineers, and no italics for our Latin phrases. Sponsors generally defend this as an approach to ensuring fairness; proposals are judged on their content, not on their slickness. Proposal writers are generally not convinced. How can a customer make the right choice about an engineering solution without seeing the choices or a table comparing features and benefits? Visuals communicate more than 60,000 times faster than text alone (Parkinson, 2007), so are we depriving our potential customers of easy-to-understand solutions and forcing them to make choices they do not fully understand?

At the other extreme may be the all-PowerPoint proposal. This boils the written document down to mostly pictures with fragments of text. The applicant submits the slides, then makes an oral presentation using only the materials submitted, and answers any questions from the review panel. There is no proposal as classically defined. In some cases, the customer requires that all the slides be in black and white, presumably for ease of copying or legibility if the slides are printed, or even presented on an overhead projector as opposed to an electronic projector and laptop.

There are steadfast holdouts against changing times, too. The US Department of Education, for example, now uses an online proposal evaluation tool, but it requires proposals to be double-spaced. This reduces the amount of text a reviewer can see at one time, which makes the online evaluation cumbersome.

The migration toward truly electronic documents likely will mean a migration away from the traditional formats that form the foundations of our work. If a document truly will be handled only electronically, then there is no reason to constrain it to an 8.5 by 11 or

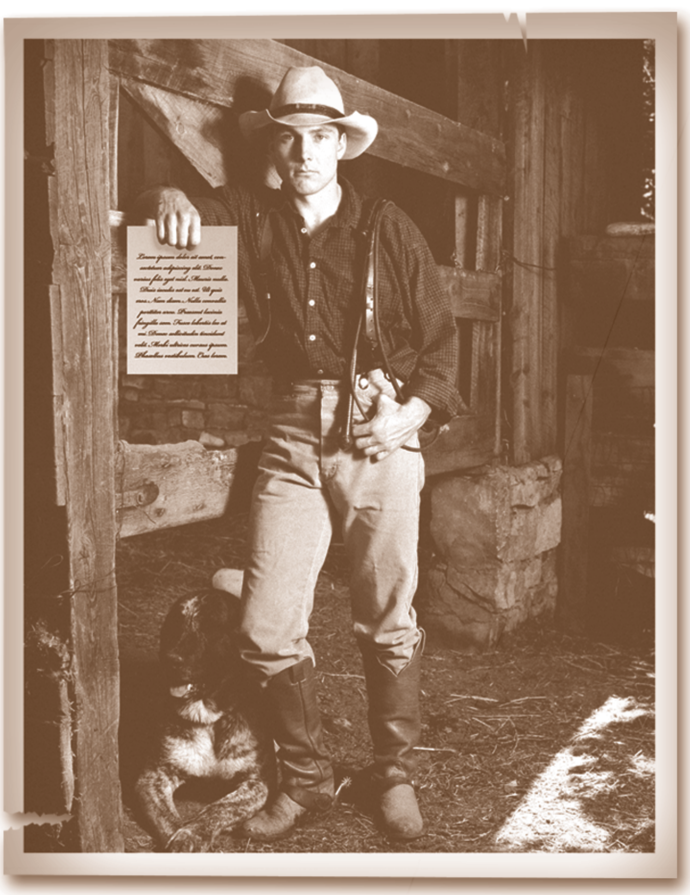
A4 page format, in portrait orientation. Most computer screens and televisions are horizontal with a wide aspect ratio. Should not our proposals, then, be written in landscape format (with a few short columns per screenful, so the reader does not have to scroll up and down to get from the top of the page to the bottom)? Or should we go to square "pages"? It will take some innovation (and courage) for a proposer to break out of the norms, and it will take a creative customer to delete the word "page" from its request for proposals. We know where we are going, but not how we will get there.

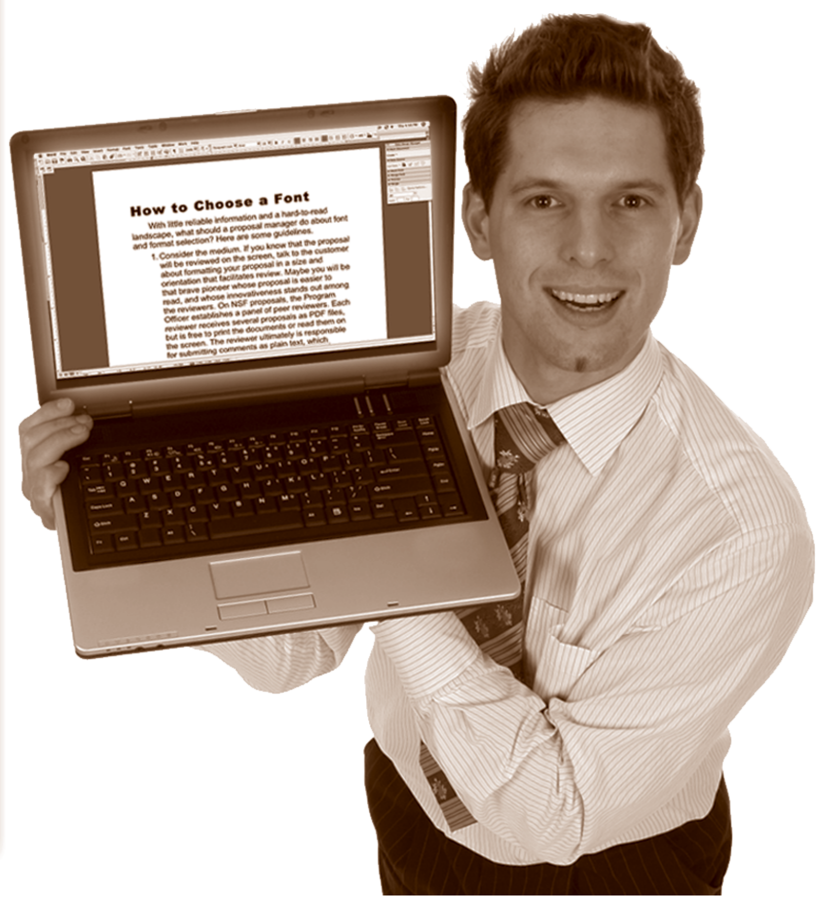
Alternatively, we could be snapped back into a standardized electronic page format. The slow rise of "electronic paper," such as the Kindle electronic book sold by Amazon.com, could impose a new set of standards for documents. Today, electronic books are an expensive novelty, and few readers consider them to be as comfortable to use as paper books or magazines (Levy, 2007). They also are currently limited to black and white. It is possible, however, that as e-book prices go down and pixel count goes up, the electronic document will still look a lot like a paper document.

How to Choose a Font

With little reliable information and a hard-to-read landscape, what should a proposal manager do about font and format selection? Here are some guidelines.

1. Consider the medium. If you know that the proposal will be reviewed on the screen, talk to the customer about formatting your proposal in a size and orientation that facilitates review. Maybe you will be that brave pioneer whose proposal is easier to read, and whose innovativeness stands out among the reviewers. On NSF proposals, the Program Officer establishes a panel of peer reviewers. Each reviewer receives several proposals as PDF files, but is free to print the documents or read them on the screen. The reviewer ultimately is responsible for submitting comments as plain text, which eventually are attached to the proposal file in Fastlane for the proposer to download. Multiple reviewers read each proposal, and they get together at NSF headquarters in Virginia





to compare notes, produce a Panel Summary for each proposal, and make a recommendation. The peer review process is advisory—the Program Officer makes the final decisions about what to fund. For purposes of our discussion, however, all we know is that the NSF process is pretty free-form. We do not know whether a reviewer will be reading our proposal as a crisp copy from a color laser printer or as pixels on a 13-inch laptop screen with a dying battery at 27,000 feet.

2. If you are page constrained and know that your proposal will be reviewed on the screen, select a typeface that is small with a large x-height. As shown in Figure 2, Georgia at 10 or 11 point gives as many characters per inch as Times at 12, but it can be more legible on the screen and give you more lines per page.
3. Consider the message that you send with the clothes that your words wear. When choosing your typeface, first confirm that you are respecting any guidelines given in the RFP. If the RFP requests Courier, use Courier. Check with your marketing department to see if there are any brand standards or prescribed typefaces, colors, styles, and other conventions that your organization enforces. Often larger companies have brand manuals that specify every aspect of the visual format of the proposal, as well as other documents and marketing material. Smaller companies may only have guidance on how their logo may be represented, and you are free to choose your own typeface.
4. Stand out, but do not use every crayon in the box. Avoid the fonts with curly-qs, hearts, and Egyptian hieroglyphic motifs. A font that is a little bit different from what your competitors use could make you stand out, but do not go overboard. Keep the look professional.
5. Beware of compatibility issues. Think not only of legibility, but also of sharing your proposal documents with other members of your team and your reviewer. If you use a typeface that is not

> installed on the other person's machine, your page count, page breaks, and other formatting may not be translated correctly, and the result can look barbaric. There are five standard font families, known as the Base-14 fonts, that include regular, bold, italic, bold italic: Helvetica (or Arial MT), Times (or Times New Roman), Courier, Symbol, and Dingbats. You can safely use and print these on every machine (Mac or PC). Use these when submitting a proposal in MS Word or if you are moving the documents through several machines and authors before production.

After you have determined the correct typeface as prescribed the RFP and your marketing department, and confirmed the typeface is on every machine you could possibly move the document to, consider that typefaces have distinct personalities and select one for its appropriateness to your design, message, and audience. We do judge a book by its cover, and make snap heuristic judgments regarding a company or an individual by their initial appearance. In general, serif fonts (such as Times New Roman and Georgia) appear traditional, serious, scholarly, corporate, and business-like and, on the positive side, communicate that your company and solution are stable, consistent, and staid.

Negatively, your reviewer may translate your font's appearance to mean boring, uninspired, or stuck in a rut. Serif fonts are usually more readable when read in long, printed blocks of text. Sans serif fonts (such as Arial and Verdana) reflect a modern, clean, or understated personality and, on the positive side, communicate that your company and solution are fresh, new, and innovative. Negatively, your reviewer may translate your font's appearance as too risky, untried, or even cheeky. Sans serif fonts are usually more legible than serif fonts when projected or read onscreen.

The proposal team selecting a font and format should consider the page limit, the customer's requirements and norms, and—to the greatest extent possible—the way the proposal will be reviewed (on screen, on paper, on a plane, etc.).

Recommendations

The proposal team selecting a font and format should consider the page limit, the customer's requirements and norms, and—to the greatest extent possible—the way the proposal will be reviewed (on screen, on paper, on a plane, etc.). If we know how the reviewers will be reading the document, we can format the document for ease of readability.

The solicitation issuer also needs to think about this more and pose out-of-the-box solutions (such as landscape page submission for a written proposal submitted electronically) or give looser formatting instructions to allow the proposal team to pose their own solutions. APMP is ideally situated to open this dialog between writer and reviewer, a process that can move us more rapidly toward the day when proposals are accessible, informative, lively, and efficient. This exercise, too, will position us for future leaps in "proposaltainment" that will make use of everything the electronic jukebox has to offer—color, motion, and sound. Whether we are ready or not, proposal writers, editors, and managers are on our way to becoming movie producers—and movies are not filed in Times New Roman on 8.5 x 11 inch sheets of paper.

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Acknowledgments

This article is based on the presentation "If You Can Read This, I Must Have Used a Legible Font," presented at the 19th APMP International Conference and Exhibits, Rancho Mirage, CA, 2008. The authors gratefully acknowledge the contribution of Bridget Skelly, formerly of 24 Hour Company, to the early development of the presentation and its adaptation to article format. Several participants in the Rancho Mirage conference made comments that are reflected in this article, and we thank them for sharing their perspectives and ideas. Finally, comments from the APMP Commercial News Group on Yahoo provided valuable insights into trends in proposal submission to commercial clients.

Mitch Boretz, AF.APMP, directs proposal operations for the Bourns College of Engineering at the University of California, Riverside. He coordinates all aspects of more than 200 proposals a year from approximately 75 engineering professors for contracts and grants with government agencies, companies, and foundations. He worked full time in proposals for 11 years following a 12-year career as a news reporter and editor. In 2008, Mr. Boretz was made a Fellow of APMP. He can be contacted at mitch@engr.ucr.edu.

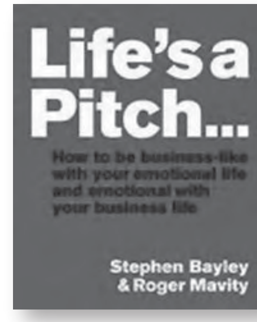
Colleen Jolly, AM.APMP, is a Principal at 24 Hour Company and Director of 24 Hour Company UK—a professional proposal graphic and production company with offices in the US and UK. She has won more than $10B in business for her clients. Ms. Jolly is responsible for book composition and cover design for the *APMP Journal* and regularly contributes articles. She is a frequent speaker at APMP conferences in the US and UK. She holds a BA in English and Studio Art from Georgetown University. Ms. Jolly can be contacted at colleen@24hrco.com or colleen@24hrco.co.uk.

Book Review

Life's a Pitch: How to be business–like with your emotional–life and emotional with your business life by Roger Mavity and Steve Bayley

Transworld Publishers, a Division of Random House Group Ltd., London, 2007; £14.99/$29.95

by Mark Whitley, AM.APMP



This volume is an unusual collaborative effort: Two authors have written two complementary books on aspects of image and persuasion, and published them as one. More of a treatise than a practical handbook, *Life's a Pitch* nevertheless contains many fantastic pieces of practical advice delivered succinctly with authority and wit.

Neither author holds their opinions back, and both favor personality and passion over procedure and PowerPoint.

Both authors are eminently qualified to write on their respective areas. Roger Mavity is the Chief Executive of Conran Holdings, a firm encompassing architecture and design, brand licensing, and retail operations. He formerly ran his own advertising company. Charles Allen, the founding Chief Executive of ITV, the biggest commercial television network in the UK, described Mavity as "without doubt, the best presenter I have ever met." Stephen Bayley is famous in the UK as an authority on style and design. He was the first Chief Executive of the Design Museum, and is now a broadcaster, critic, and consultant on design and presentation.

More than half of Roger Mavity's chapter allocation is dedicated to eminently applicable advice for any presenter. He advocates putting the effort in to identify the central core of your argument, and then building a compelling story around it. This can best be achieved by ensuring you give yourself time to think. Evangelical about storyboarding, he recommends using a thick pencil on a large page of paper to force big picture thinking. Mavity stresses that any presentation is theatre and that the script is more important than the performance. When the script is nailed, you still need to allocate sufficient time to rehearse the performance to perfection. His remaining chapters hone in on several specific areas related to pitching, but also allow Mavity to cover topics as diverse as the loneliness of power (it is indeed isolated and exposed at the top) and what management consultants do (very little).

Stephen Bayley's chapters have less to do with formal presentations than with personal presentation. He covers first impressions and how to make the best of them, letter writing, and the strategy of lunch. He clearly conveys his belief that image is important (so important that personal camouflage should be used at certain times), and that persuasion is all about seduction.

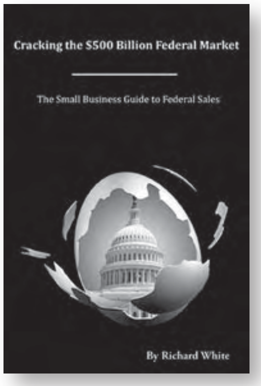
Neither author holds their opinions back, and both favor personality and passion over procedure and PowerPoint.

Is this book a useful read for APMP members? Although it could easily have been published as two separate books for two slightly different audiences, I recommend it for the practicality Mavity provides and the challenge Bayley poses.

Mark Whitley has business development and bid management experience in manufacturing, financial, broadcasting, telecommunications, and other service industries. He is a chartered marketer and chartered engineer. He can be contacted at markwhitley@btinternet.com.

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



Cracking the $500 Billion Federal Market: The Small Business Guide to Federal Sales by Richard J. White

Wood River Technologies, Inc., 2008; $14.95

by Betsy Blakney, AM.APMP

Betsy Blakney, APM.APMP, has 12 years' proposal development experience and currently is the Director of Proposal Services for Universal Systems and Technology, Inc. (UNITECH). Betsy is the Books Editor for the Journal of the Association of Proposal Management Professionals *and serves on the APMP Board of Directors as the Eastern Region Chapter Representative. She can be contacted at bblakney@unitech1.com.*

Richard White has expanded Chapter 11: "Small Businesses and Federal Sales" in his first book, *Rolling the Dice In DC: How the Federal Sales Game Is Really Played (2006)*, to create this sequel focused on small businesses penetrating the federal market. This book encourages small businesses to pursue federal opportunities, removes the mystique of federal contracting by presenting the realities of doing business with the Federal Government, and provides sage advice on how to survive the red tape and become a real player among the giants.

> *White's anecdotal experience sets the reader's mind at ease, eliminating the fear often associated with breaking into markets frequently dominated by insiders.*

White's well-organized format and clear command of the subject makes this book a quick read. Each chapter leads with takeaways before going more in-depth on a particular topic's background. The structure features the following points:

- Outsider Perception (what everybody else thinks)
- Reality (what is really going on)
- Lesson (what action to take).

The first chapter, "The Best Offense is a Good Defense," sets the tone for the rest of the book. From "Market Research in the Federal Sector" to "Consider Starting as a Subcontractor to a Prime" to "Steps to Take After Winning Your First Federal Contract," the book guides the small business owner along the path to success.

Other topics White addresses include competition and price sensitivity in the federal market, fundamentals of federal contracting, and small business preference programs. For a small business trying to tap into this market for the first time, I found the chapter on learning how to write federal proposals especially thoughtful. White could have used this section to promote his own business seminars via Fedmarket.com, but he avoided the opportunity for self-aggrandizement and added more value by supplementing this chapter with an appendix entitled, "More on Proposal Writing." I wish I had had this information and insight when I first entered the profession managing proposals for a woman-owned 8(a) professional services firm looking to grow its business.

White's anecdotal experience sets the reader's mind at ease, eliminating the fear often associated with breaking into markets frequently dominated by insiders who tower over the rest of the players and repeatedly grab the headlines. Learning how to play the game is the premise of this book.

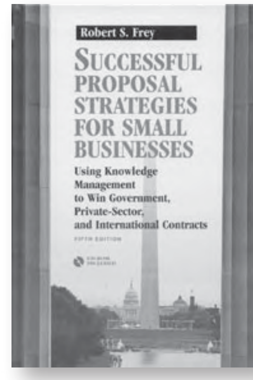
For the price and size (84 pages), it is easy to understand why White's book should become a valuable resource for small business owners and their sales staff. With the positive energy it conveys and the practical guidance it offers, small businesses will welcome its easily digestible format, its sensible approach to breaking down barriers, and its focus on the possible rather than the impossible.

Book Review

Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (Fifth Edition) by Robert S. Frey

Artech House, Inc., 2008; $119.00

by Ali Paskun, AM.APMP



Ali Paskun, AM.APMP has extensive proposal experience working as a coordinator, writer, editor, and manager. She currently provides a wide variety of proposal consulting services to clients in the Baltimore-Washington area. Ali is the Assistant Editor for the Journal of the Association of Proposal Management Professionals *and Managing Editor of the* APMP Perspective. *She can be contacted at booklover@erols.com.*

Once again, Robert Frey has revised this excellent resource for small and mid-sized businesses, non-profit organizations, and public sector agencies. The additions to this edition increase understanding of the acquisition lifecycle for those who currently bid on, or would like to bid on, Federal Government solicitations.

> *Frey's book should be included in every proposal professional's library.*

Frey has added two new chapters to this edition, entitled "Preparing for Graduation from the 8(a) Program" and "Succeeding in the World of Very Small Businesses." The first new chapter outlines how a small business owner can successfully transition from the 8(a) program by planning such activities as:

- Adding the right key staff
- Implementing a forward-looking incentive program
- Building a knowledge-sharing culture
- Pursuing and implementing industry-standard certifications, accreditations, and processes
- Letting loose the corporate reins.

The second new chapter, although brief, provides insight into the special problems a company designated as a Very Small Business can encounter when bidding on Federal Government solicitations. The chapter provides specific state-level resources available to these business entities. It also explores how very small businesses can overcome obstacles, such as the lack of time, staff, and resources or focused strategic planning.

Other new topics Frey addresses are creating a rapid-response task order proposal engine, emerging trends in Federal Government procurements, and overcoming proposal and contract risk. One new aspect of the book I found particularly interesting was in the chapter, "Tried-and-True Proposal Writing and Editing Techniques," where Frey offers a section on the topic of "Storytelling as an Art Form." This section brought to mind Frey's article "Winning Federal Government Contracts Through Fact-Based Storytelling" that was published in the Spring/Summer 2005 edition of the *Journal*. I enjoyed reviewing the article after reading this section of the book to gain a further appreciation of his premise.

Other sections of the book have been updated from previous editions. Some of the topics Frey has expanded on include Mentor-Protégé programs, benefits of knowledge management in proposal management, and performance-based acquisitions.

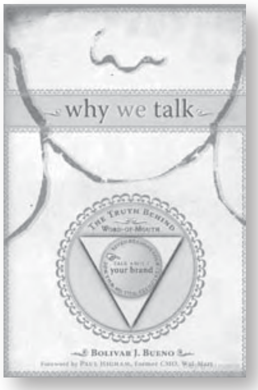
As with previous editions, a CD-ROM is included that contains proposal templates, links to Websites related to small business needs, proposal and contract acronyms, a glossary of proposal-related terms, and a proposal cyberlibrary electronic infrastructure.

Frey's book should be included in every proposal professional's library. The information and tools provided are easy to use, helpful, and offer a firm foundation for every small business owner.

Book Review

Why We Talk: The Truth Behind Word of Mouth Marketing by Bolivar J. Bueno

Creative Crayon Publishers, 2007; $24.95



by Chris Simmons

Chris Simmons is an APMP member and acting Chairperson of the National Capital Area Chapter Membership Committee. He is also the founder of Rainmakerz Consulting (www.rainmakerz.biz)—a business development solutions company specializing in proposal development.

Like most overworked business development professionals, I have too many things to read and not enough hours in a day to read them. It normally takes a lot for a book to make it to my reading list, and it is a rare event for me to complete a cover-to-cover read—usually between proposals or while on family vacations.

I had high hopes for *Why We Talk*. The Fall/Winter 2007 *Proposal Management* article by Kellie Glueck, "Strong Branding in Proposals Increases Success," initially raised my level of consciousness on the importance of branding—one of the main themes of the book. The targeted audience for the book (CEOs, marketing executives, and business owners committed to building relationships with customers) also seemed right up my alley. The heart of the book, the 7 Reasons Why Customers Will—or Will Not—Talk About Your Brand (Part IV), set my expectations high for a highly focused, benefit-driven approach that I could practically apply to building better relationships with my customers.

> *Unfortunately it was a big disappointment for me and provides only marginal value to the busy business professional searching for nuggets of customer relationship wisdom.*

The book purports to be a thought-provoking guide with a scientific look (research) at language and social systems. Unfortunately, it was a big disappointment for me and provides only marginal value to the busy business development professional searching for nuggets of customer relationship wisdom. The scientific "research" is nothing more than a summary of existing literature on the anatomy of communication, gossip, and social systems. In fact, the content seemed more like a college freshman thesis paper than the action-oriented book I expected.

Why We Talk is filled with countless historical, religious, psychological, cultural, and, sociological references. A whopping 100 publications are listed in the bibliography and an even more astounding 170 references are footnoted throughout. The vast majority of these references are mostly universal truths or statements of the obvious that offer business development executives little value-added knowledge or insight. The wide-ranging quotes from well known sources (including the *Book of Genesis*) and the gossip about Tom Cruise made reading distracting and even annoying at times.

The seven principles for understanding Word-of-Mouth (WOM) are described in the 40 pages the author suggests represent the "practical application of the research." The seven principles are: (1) Integrity; (2) Status; (3) Cool; (4) Groups; (5) Influence; (6) Meaning; and (7) Surprise. The "How to Apply" page for each of these principles offers little insight for the business development professional. For example, the best way to apply the Principle of Influence to your business (Principle #5) sounds like advice my grandmother gave me at a young age while working in her women's clothing store: influence many small groups of influencers, stay relevant to your customer, and respect your audience.

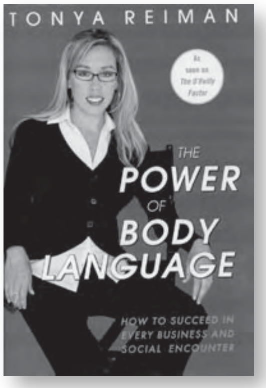
Why We Talk is an easy read (only 114 pages) with liberal use of headings/sub-headings, extra spacing, and large print. There are a handful of interesting digressions and a WOM nugget or two. "Don't focus on ways to control the conversation, focus on ways to get it started" was one of the few interesting and thought-provoking concepts the book has to offer. Unfortunately, the few nuggets of wisdom are buried in a mass of references (sometimes three-to-four to a page) with liberal use of long quotations, especially from Abraham Maslow. The book includes a graphic (the only one) of Maslow's Hierarchy of Human Needs that reminded me of my Introduction to Psychology course at Boston College.

The author uses tired clichés, axioms, and sophomoric idioms throughout like "pick your poison," "under promise and over deliver," "in one ear and out the other," and "knowledge is power" to support the seven principles. I found text repeated on consecutive pages and awkward in places ("Customers can be broken down into two sub-groups"). The occasional use of street language did not create the passion the author intends, and the obvious typographical error on the top of page 106 was inexcusable.

I believe most readers will likely be surprised by this book and will have a lot to talk about.

The major takeaways from this book are hardly compelling and not terribly insightful: "Listening to your customer is more effective than talking to your customer," and "Create experiences for your customers through your products and services that give them something to talk about." I believe the author has succeeded in applying his Principle of Surprise (Principle #7). "If people are surprised, it's hard for them not to talk." I believe most readers will likely be surprised by this book and will have a lot to talk about. Unfortunately, not much of the WOM marketing talk will be positive. My advice? Do not bother reading this book unless you are an entry-level marketing manager with extra time on your hands, a budding anthropologist, or an aspiring teenager with interests in the marketing field.

Book Review



The Power of Body Language: How to Succeed in Every Business and Social Encounter by Tonya Reiman

Pocket Books – A Division of Simon and Schuster, Inc., 2007; $25.00

by Ali Paskun, AM.APMP

Ali Paskun, AM.APMP has extensive proposal experience working as a coordinator, writer, editor, and manager. She currently provides a wide variety of proposal consulting services to clients in the Baltimore-Washington area. Ali is the Assistant Editor for the Journal of the Association of Proposal Management Professionals *and Managing Editor of the* APMP Perspective. *She can be contacted at booklover@erols.com.*

As Tonya Reiman states in the introduction of this book, "Research has found that as much as 93 percent of our interpersonal communication is nonverbal. How your body moves, what expression your face makes, how fast you speak—even where you stand or sit, how much perfume you have on, what type of jewelry you wear, or whether your hair is long or short—all of these elements send messages far more convincingly than any words spoken." Using scientific research, personal experiences, and knowledge gained as a nationally recognized body language expert, Reiman offers practical guidance that cracks the code of nonverbal communication regarding the face, the body, space, touch, and sound.

Reiman offers practical guidance that cracks the code of nonverbal communication regarding the face, the body, space, touch, and sound.

Do not think, however, that this book is dry, technical, or analytical. Reiman's conversational writing style ensures an entertaining and often humorous read. Throughout the book she offers real-world applications of the nonverbal cues being discussed and suggests practical ways readers can use body language to present themselves and decipher how others are presenting themselves. She not only discusses what the different nonverbal signals mean, but also why people interpret these signals they way they do. The photographs and illustrations are beneficial demonstrations of the specific points Reiman offers.

After breaking down the cues in the various groups of nonverbal communication addressed (face, body, space and touch, and sound)—and this is where the fun really starts—Reiman begins to show the practical applications. Subsequent chapters address such topics as how to use body language to master first impressions, reading someone's secret signals (e.g., is he/she lying to me?), and using your own secret signals (e.g., how to motivate others or build a united team).

The final chapter of the book outlines the Reiman Rapport Method designed to help anyone become a Master Communicator. As she explains, "out of all of the tens of thousands of possible signals you can send in any interaction, just a small handful could make the difference between fumbling that critical deal or actually getting the 'yes,' or between parting ways forever with a wonderful person." The 10-point system defines the most key signals that can help anyone "build congruent, welcoming, universally pleasing body language, in any situation, with any individual." She breaks down each signal in an easy-to-understand manner and provides a guide to mastering each step, such as relaxing your face or anchoring good feelings, so it becomes a permanent and instinctive habit.

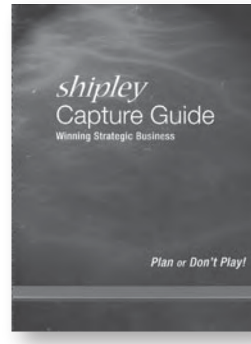
Two other features of the book added to my enjoyment. The first was the appendix that contains 20 frequently asked questions related to body language (the one from the poker player was particularly interesting). The second was the use of call-out boxes labeled "His Signals/Her Signals" that discussed how the meanings of various body language cues differ between the sexes.

I highly recommend this book; it is a fascinating exploration of how to read other people's body language and how to control your own to send positive signals. It is a practical guide that provides information that can only help improve business and personal communication.

Book Review

Shipley Capture Guide Winning Strategic Business by Mary Ann Anelli

Shipley Associates, 2008; $159.95



by Robert Lohfeld

The *Shipley Capture Guide* presents a description of the activities a company needs to perform before a Request for Proposal (RFP) is released. These activities are the building blocks that help position the company to win and, like building blocks, they lay the foundation for writing better proposals and hopefully increasing the bidder's win probability.

The Guide is organized around five key process areas—Managing the Capture Process, Building Relationships, Gathering and Analyzing Data, Developing and Implementing Strategies, and Transitioning to the Proposal. A list of 20 suggested key activities supports the process areas, and the first activity is Building the Capture Plan. Anelli describes a capture plan and the kind of data collected, and provides a sample capture plan template on a CD that comes with the book. She cautions readers to customize the template for their own use rather that use the sample template "off the shelf."

Key activities, such as forming the capture team, assessing the opportunity, developing the win strategy, setting the price to win, developing teaming strategies, and conducting Black Hat reviews, are some of the activities described. The Guide does not purport to provide a complete list of activities, nor a comprehensive checklist for performing each activity. Instead, it describes the selected activities well, and weaves in lessons learned and cautions for the first-time practitioner.

While the Guide provides much information, it does not link the key activities to a capture "process." Instead, it presents a discussion of various capture topics in alphabetical order. While this information is well presented and helpful in developing a deeper understanding of capture, it does not lay out a roadmap that assembles activities into a repeatable process. This task is left to the reader. With the building blocks well described, the art of the capture process still remains with the practitioner, and the caveat "some assembly required" certainly applies to this Guide.

With the building blocks well described, the art of the capture process still remains with the practitioner.

Bob Lohfeld is founder and CEO of Lohfeld Consulting Group, Inc., a company that provides capture and proposal support for government contractors. He was a frequent lecturer on capture management and has taught capture management for more than 100 companies. Prior to founding Lohfeld Consulting Group, he served as a division president at Lockheed Martin. Bob has served on the Board of Directors of APMP's National Capital Area (NCA) Chapter since 2006 and currently serves as Programs Chairperson.

Book Review

How to Wow: Proven Strategies for Presenting Your Ideas, Persuading Your Audience, and Perfecting Your Image by Frances Cole Jones

Ballantine Books, 2008; $22.00

by Chris Witt

Chris Witt is a free-lance orals coach and executive speech writer based in San Diego. He was a presenter at the 18th Annual APMP Conference in Savannah, GA. His book, Real Leaders Don't Do PowerPoint: How to Sell Yourself and Your Ideas, *is due out from Crown Publishing in February 2009. He can be reached at chris@wittcom.com*

This book is like a pot-luck supper where every dish is someone's favorite, and there is much to be sampled and savored. It offers a rich serving of practical advice for people who want to improve how they communicate themselves and their ideas. Everyone will find something in it to their liking.

The author is a corporate coach who has "helped numerous CEOs, celebrities, and public personalities present their best selves on camera and onstage, in boardrooms and in life." She writes in a friendly, informal style. She makes liberal use of anecdotes that everyone in today's workplace will recognize and identify with. Her advice is practical and pointed, sometimes *very* pointed. When you are choosing a shirt, for example, she urges you to pick blue and, "within the spectrum of possible shades of blue, I recommend a French, or cornflower blue."

> *If you like pot lucks, where there is more than you can possibly take in, you will enjoy this book.*

Each of the nine chapters is broken into two-to-three page sections, which are somewhat freestanding. You can open the book at random, read a couple of pages, and learn something you can immediately apply. Each chapter ends with 10 to 20 "Summing It Up" bullet points.

The book covers the whole range of interpersonal communications and interactions: the fundamentals, one-on-one encounters, meetings, job interviews, speeches, PowerPoint presentations, writing, social interactions, and persuasion.

The chapter titled, "Pointed PowerPoint: Making PowerPoint Powerful," is perhaps the one most pertinent to proposal managers. It emphasizes the need for practice. "It's too easy," she writes, "to succumb to the idea that having visual aids is enough to make an impact." She recommends at least three rehearsals, rightly discouraging simply reading slides to the audience, instead urging presenters to prepare a script of sorts, talking points to trigger the memory. She also discusses how and when to handle questions.

My one criticism of the book is that it is too broad in *scope*. Each chapter touches lightly, though well, on a wide range of topics. The chapter on writing, for example, addresses email, resumes, speeches, responses to RFPs, cold-calling scripts, Websites, signage, and thank-you notes. Each chapter, sometimes each section, covers topics that entire books have been written about. What you gain from the book's breath of coverage, you lose from its lack of depth. The two pages Jones devotes to writing a response to an RFP, while full of solid advice, will add little insight to anyone who has anything more than a beginner's experience with them.

It is also too broad in *audience appeal*. It has something for everyone—from the person who needs advice on table manners to the speaker using a teleprompter. You will find a lot of good advice, but you will also find entire sections that you will have no interest in. In the chapter on writing, for example, is there any one person who needs—or wants—to know how to write resumes, cold-calling scripts, Websites, and signage?

If you like pot lucks, where there is more than you can possibly take in and where you are free to pick and choose, you will enjoy this book.

Accreditation Update!

by Chuck Keller, AF.APMP

APMP Accreditation Program Director

The end of 2008 is in sight, and 2009 is lurking around the corner.

As you look ahead to the New Year, I challenge you to set and meet the following goals:

1. Affiliate with an APMP Chapter. There are many US and international chapters to choose from, including chapters that conduct physical and virtual meetings. For a list of APMP chapters, see www.apmp.org/ca-11.aspx.

2. As an affiliated chapter member, support your chapter in some way, such as attending or speaking at a chapter meeting or serving as a chapter officer or committee member.

3. Attend at least one APMP major event, including the APMP Annual Conference and the many fall events held by chapters. (The 2009 APMP Annual conference will be held in Phoenix, AZ. For the fall of 2008, there were six major chapter events scheduled by eight sponsoring chapters: the APMP DACH, Carolina, Florida, Georgia, NCA, Nor'easters, SOCAL, and UKAPMP chapters.)

4. Recruit at least one new member to the APMP and your APMP Chapter. Let us do our part in helping the 2,952 members.

5. Earn an APMP Accreditation level—either an initial level (Foundation) or an advanced level (Practitioner or Professional) (As of August 2008, 841 accreditation designations had been awarded, including 734 Foundation, 86 Practitioner, and 21 Professional accreditations.)

As the new APMP Accreditation Program Director, I am responsible for promoting and publicizing the APMP Accreditation Program and answering questions about the program. As such, I especially encourage you to meet goals 2, 3, and 5.

- Meeting goals 2 and 3 can provide you with Continuing Education Units (CEUs) to maintain APMP Accreditation. To learn about the many ways you can earn CEUs, see www.apmp.org/fv-425.aspx for the "Continuing Professional Development (CPD) Guidelines."

- Meeting goal 5 will not only allow you to enhance your professional skills and be recognized for the achievement, but also give you an incentive to earn CEUs as by-products of meeting goals 2 and 3. For details about the APMP Accreditation Program and its three levels of accreditation, see www.apmp.org/ca-16.aspx. You may also contact me at AccreditationDirector@apmp.org (email) or 404-219-1119 (phone).

I hope that 2009 is a year of growth for APMP membership, the APMP Accreditation Program, and, importantly, for your own professional growth.

Authorized Training Organizations

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

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

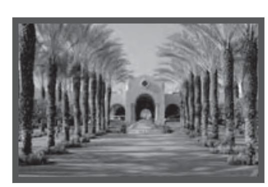
Tony Birch
Neil Cobb
John Elder
Robert Frey
Alan Goldberg
Jon Williams

2007 Recipients Presented May 29, 2007, Savannah, Georgia

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

2008 Recipients Presented May 27, 2008, Rancho Mirage, California

Mitchell Boretz
Cathy Day
Daniel Fuller
Jay Herther
Suzanne Kelman
Mike Parkinson
David Sotolongo



Index of Articles

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

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Article	Moss, Ann L. and Parkinson, Mike	*Visual Proofreading: Three Steps to Proofreading Proposal Graphics*
Article	de Castro, Giandra	*Pioneering Proposal Management in France*
Article	Sokolow, Jayme A.	*Proposal Professionals and the Pursuit of Happiness*
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Review-Book	Frey, Robert S.	*Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Graphics into Graphics that Sell*
Review-Book	Paskun, Ali	*What People Want: A Manager's Guide to Building Relationships that Work*
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Article	Glueck, Kellie	*Strong Branding in Proposals Increases Success*
Article	Morgenstern, Jessica	*A Look at Industry and Government Acquisition Lifecycles*
Article	Ritchey, Robin	*And the Survey Said... Soliutions to Everyday Challenges*
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Forum	Eassom, Dick and Taylor, Paul	*CEO/COO Forum*
Review-Book	Blakney, Betsy	*Writing White Papers (by Michael A. Stelzner)*
Review-Book	Paskun, Ali	*The Jelly Effect (by Andy Bounds)*
Review-Book	Paskun, Ali	*Project Portfolio Management Tools and Techniques (by Parviz F Rad and Ginger Levin)*
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Review-Book	Wingate, Beth	*Billion Dollar Graphics (by Michael T. Parkinson)*
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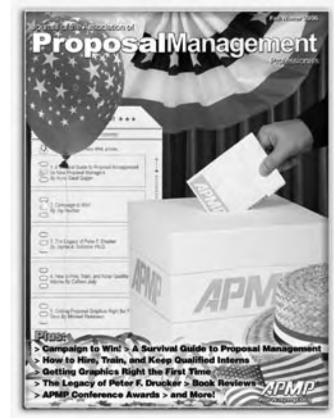

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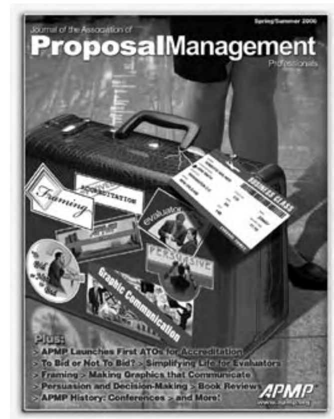

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Article	Parkinson, Michael	*Making Graphics that Communicate Clearly*
Article	Paskun, Ali and Elder, John	*APMP: Sixteen Years of Promoting Our Profession (Part II)*
Annual Conf.	Keller, Chuck and Winton, David	*The APMP Annual Conference Returns to New Orleans as Life Returns to the "Big Easy"*
Award	APMP	*The APMP Fellows Award*
Forum	Birch, Tony and Taylor, Paul	*CEO/COO Forum*
Int'l Report	Taylor, Paul	*2006 APMP International Report*
Review-Book	Paskun, Ali	*The Booklover's Guide to New Orleans (by Susan Larson)*
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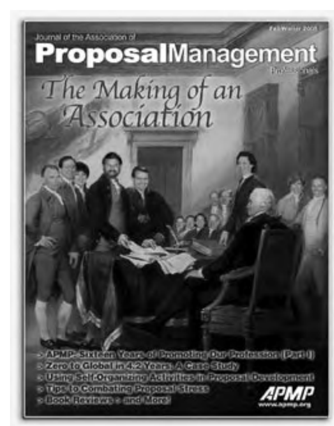

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Forum	Birch, Tony and Taylor, Paul	*CEO/COO Forum*
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