Welcome

Ali Paskun, AF.APMP

There are some things different about this issue of the *Journal*—things that I think you will find exciting. These differences not only include some changes to the staff, but also changes to the *Journal* itself.

As I assume the role of Managing Editor, I owe a debt of gratitude to John Elder, who held that position for the past five years before stepping down a few months ago. During the time I served as Book Editor and Assistant Editor during his tenure, he was a mentor who always pushed me out of my comfort zone. His dedication to APMP and his enthusiasm for publishing a high-quality *Journal* have always been motivating. John will be a hard act to follow.

There are some other staff changes. Betsy Blakney, PPF.APMP has agreed to assume the responsibilities of Assistant Editor. An active APMP member, she is on the APMP Board's strategic initiative committee to grow the APMP Body of Knowledge. Before being elected Secretary, Betsy served as APMP's Regional Director for the Eastern United States for two years, and is a former National Capital Area Chapter President. Beginning with the next issue, Spring/Summer 2010, Jim Hiles is joining the staff as the Books Editor. Jim is an avid consumer of proposal-related books and materials. He is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the federal government.

However, as the saying goes, "The more things change, the more they stay the same." That is why the remaining staff members who volunteer their time and talent to every issue must be recognized as well: Linda Mitchell, Rick Rider, and Colleen Jolly. I am also especially appreciative to Jayme Sokolow for being so instrumental in helping me during this transition to a new role. Finally, I would like to thank David Winton and the APMP Board of Directors for their vote of confidence and support.

As for the other changes, the *Journal* has gone green and is now being published on recycled paper. In honor of this commitment, the next issue of the *Journal* will have a green theme. Take advantage of this opportunity to become involved! Submit an article related to how the proposal profession can be environmentally friendly. Has your company instituted a policy to reduce its carbon footprint? Write a case study. Do you have ideas of how to increase recycling in your proposal center? Share them. Be creative, and contribute to your publication. See the author's guidelines in this issue about how to develop and submit an article.

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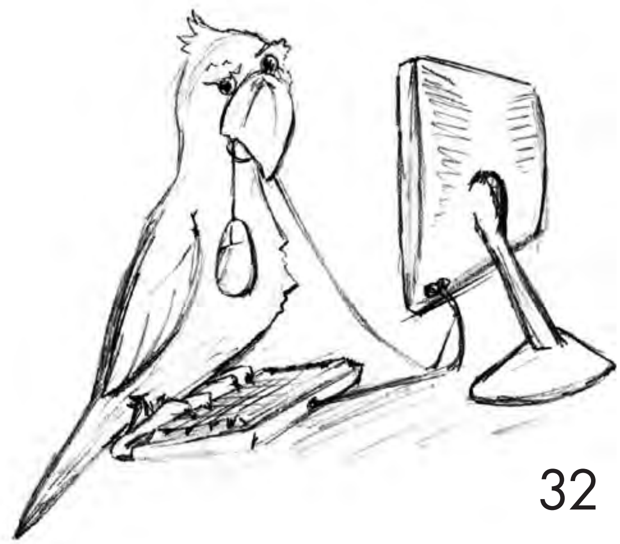

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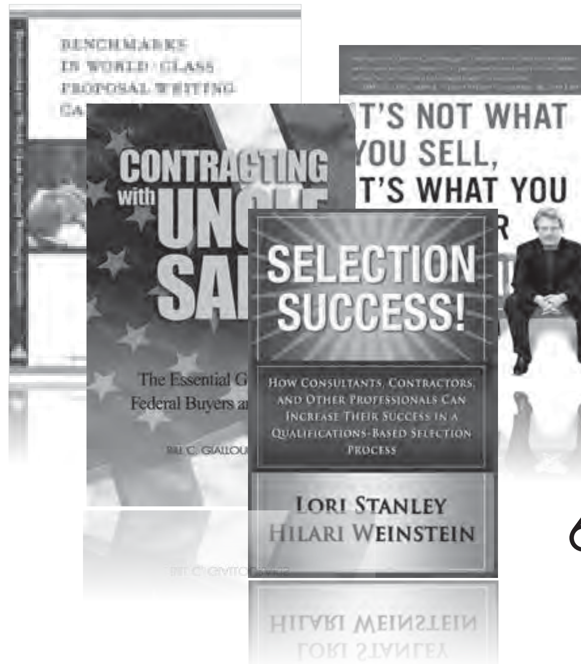

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David Bol, AF.APMP

Storyboards—a lost art?

I have been managing a lot of proposals lately. It seems like I have two to three in various stages at any one time. I bounce from Black Hat reviews, capture planning to Pink Teams to Red Teams, Gold Teams, Pricing Reviews and even delivered one to a customer personally a couple of weeks ago. As I sit through the lessons learned and we review the proposal process, one of the elements noticeably missing is a clearly defined and developed storyboard.

Definition of storyboards

Storyboards have been around for quite some time. Anyone who has sketched an idea on the back of a napkin has used a storyboard. Architects have been using storyboards for hundreds of years with blueprints. Both the napkin and the blueprint represent the storyboard in its most basic concept—an idea expressed visually that is used to develop an idea or thought. It is used prior to writing and supports a creative process that, if used consistently, will improve the quality of the writing supporting this idea.

The Business Development world took notice of storyboards as a result of the motion picture and cartoon industries. Storyboards were often used as the initial thought process that developed an idea or theme from the beginning to end. Many storyboards were needed to progress the story and the plots. As each one was completed, it was placed on a wall, and as one "walked the wall," they could observe the story unfold. When you finished, the goal was that a clear picture had been developed that told the story from beginning to end. Viewers were asked to make comments that developed the scene and the characters. Only when the storyboards were completed did the cartoon go into final drawing or the picture into final production. This became critical as it saved the studios time and money as there was a clear direction to follow and all the preliminary content was developed. Would not that be a great concept for proposal responses?

> "**Storyboards** *are conceptual documents that show the authors what the solution is before one word of text is written.*"

In the beginning…

After we have taken a look at the proposal, the first question we must ask ourselves is where and how many storyboards should we use. There is not an easy answer for this, but here are some guidelines.

- At a minimum, every volume should have its own storyboard including the pricing volume. If there is no text in the pricing volume—only tables—then a storyboard may not be needed.
- Each major section or subfactor within the volume should have its own storyboard. For example, if the Technical Volume has a management section, a technical section, a personnel section, and a transition section, each one of these should have a storyboard that develops the section content.
- Within specific sections, if there are distinct parts, each part should have its own storyboard. For example, if the technical section describes construction of a new telephone system for your office, the basic phone switch, the inside wiring, the user instruments, the systems features, and the cutover with training and timeline all might have their own storyboards.
- Stand alone documents may need separate storyboards. Often the RFP will ask for plans—a security plan, a quality plan, or a transition

plan. If these are off the shelf for your company, that might be a good place to start. If you need to start from scratch, a storyboard would be an excellent place to begin.

I have always felt that if the section could stand alone or is separated with specific numbering in the RFP, it merits a storyboard. I realize that this is a lot of storyboards, but as you will see later, these tools facilitate writing, increase the quality of writing while decreasing the time spent on writing, and eliminate the false starts and writers' blocks that often accompany writers if they simply go from RFP requirements to writing. I personally did a large GSA proposal where we were watching 63 technical storyboards and more than 50 management storyboards at the same time—and yes, we won!

Getting started or when to use the storyboard

Now that we have an idea of an outline of our response and the associated storyboards we will create, what is the next step? Get with the core authors and stakeholders, and begin to populate your storyboards. Remember, these are by no means the final product or solution; they are simply initial concepts or ideas that can be developed. Using an example of building a house, the first thought must be: what type of house. From there you think about square footage, number of bedrooms, bathrooms, etc. Then, you add additional detail, like colors, tile, carpet or wood flooring, fixtures, etc. Finally, when all the requirements are met, you decide what you can do to add value that will make it attractive to buy.

The same steps are followed in a storyboard. Look at the high-level solution first. Once it is agreed to, then start to look at the major requirements that will build to the solution. As those factors are included into the storyboard, the detail begins to take shape. Check off the requirements as they are included. After all the requirements are met, add value and the discriminating features that will set this solution apart from the rest. Stay within reason and budget, but look for ways to make your solution the one that gets selected

As you begin to populate the storyboard, you need to look for ways to develop your win strategy with your solution. This is the fundamental purpose of the storyboard. So often writers will answer specific requirements as they write without keeping in mind the bigger picture, which is writing a document with a sales slant versus one that is technically focused. A good storyboard will take win strategies or win themes and apply them to the solution, giving the authors the guidance they need. Particularly with technical solutions, storyboards should include which trades were performed to demonstrate that yours is the optimum solution.

In the RFP world, storyboards should lead to mockups. What is the difference between a storyboard and a mockup?

Storyboards are conceptual documents that show the authors what the solution is before one word of text is written. They have notes that contain the requirements of the solution, often support strategies and themes, almost always are visual, and contain no more than bullets for content solution. They initiate the high-level creativity and thought process.

Mock ups take the storyboard to the next step, and integrate the solution into a page-for-page representation that the proposal is asking for and that you have allocated. Your management storyboard may only be 4 pages, but when you mock it up, if you allocated 18 pages for it, the mock-up will be 18 pages! Now you incorporate the headings and section titles driven by the RFP, and you merge this with the storyboard content. This gives a mock up including your visuals, themes, bullets, and any content carried over from the storyboard. Now before any text has been written, the authors have a clear understanding and vision of the section they are writing to. They have the structure, preliminary page count, themes, strategies, graphics, bullets, and content. They can focus and write specifically to the section at hand versus a just-start-writing-to-the-requirements approach.

Elements to include in storyboards

There are many examples of storyboards out there. I checked APMP's Body of Knowledge™ and found examples there. Additionally, there were several good articles on storyboarding and the processes involved. Below is a table that has the elements that should be considered in a storyboard.

TERM	Description	Benefit of Inclusion
Outline	The flow of information driven by the RFP	Gives structure to the document increasing the writer's capability to focus their responses
Requirements	Statements that must be answered in the section	Increases chances of document being fully compliant; reduces time going back and responding to a forgotten requirement
Strategies	Plan to get where you want to go	Improves authors ability to write a believable and sound solution
Solutions	Your answer to the RFP requirements	Focus the authors to a common end point increasing cohesiveness and believability
Feature/Benefits	Attributes of your solution	Offers value specific to the customer
Discriminators	Attributes of your solution specific to your company	Elevates you above the completion making your solution more attractive to the customer
Relevant Experience	Current capabilities that your company has that mirror the RFP requirements	Offers credibility that you can perform the work making it easier for the customer to select you
Theme statement	A specific sentence that links benefits to features	Specific, motivating thought that will focus the authors to support your discriminating features
Graphic	A visual of your thoughts	Makes the document much easier to read and often easier to comprehend
Focus Boxes	A text box that highlights a specific thought or concept that you want to stand out	This is a strong statement, typically quantitative, that highlights a feature/benefit that is substantiated in the text that follows

Alibis: why storyboards are not used

I believe there are four major reasons that storyboards are not used.

1. **The team does not feel they have enough time.** When we plan our response schedule, we often do not include the time for storyboards. We are already feeling a sense of urgency, and we need to jump right into writing against the requirements. We create an outline, paste in the applicable requirements, assign a page count, and then send the authors away to write their response. A couple of my teams fit this scenario, especially in the Indefinite Delivery, Indefinite Quantity (IDIQ) world. When our customer asks for a response in 10 days, one of the first things we compromise are the storyboards. It should be one of the last things we remove.
2. **They do not perceive any value in doing the storyboard exercise**. "Why do we need storyboards? I have won lots of proposals without them." Unfortunately this is heard all too often, and admittedly it is true. However, how many all-nighters were pulled because of rework after a review? Could this have been prevented by using a storyboard and setting the direction early? You can win without them, but the process is much more efficient giving you back your life if they are used.
3. **They do not have a tool or they do not know how to teach the storyboard concepts**. Often the concept of storyboarding or the tools we have to storyboard with are awkward. Additionally, some proposal managers or capture managers are unfamiliar with storyboards and are reluctant to use them. To show leadership with the proposal team, the proposal manager will skip this critical step so as not to expose any weakness in their ability to lead the team.
4. **They feel the transition from storyboard to mock up to first draft is too challenging/difficult.**

A good storyboard
will force the author
to think visually…

A good graphic
often saves content,
makes the document more appealing,
and can tell an additional story
all by itself.

Once the storyboard is filled out, now what? How do I take this information, and put it into a mock up and then my first draft. Often writers forget what was on the storyboard, go back to old habits, and begin writing. As a proposal manager, we need to work with these authors. Coach them, and help them transition their work from the storyboard to the first draft. It is a great bonding experience, and a time-saving exercise that both you and the writer will greatly appreciate.

The bottom line

We must always consider the use of storyboards. Any time up front spent on storyboards saves time and wasted energy on the back end where time is always critical. Storyboards set the stage for all authors and writers to follow. Many times after Pink Teams and Red Teams we get comments that our response seems to be authored by many different people. This is obviously the case, but this comment can be somewhat eliminated with the use of storyboards. Now all authors write to the same solution incorporating strategies and writing to themes that without storyboards are often not there. Another comment I get often is that we do not have enough benefits or we do not have any discriminators. If a storyboard is not used and an author is left to simply write, this will more than likely be the case. All the writer's typical concerns about meeting the requirements and the ancillary elements that would distinguish the response are simply not there.

And finally: the inclusion of graphics in our response. What author gives you too many graphics? Very few. Unless it is a diagram, a drawing, a flow chart, or some technical schematic, few technical writers think visually. This leaves us with page after page after page of text. It is difficult to read and hard to comprehend. A good storyboard will force the author to think visually. A good graphic often saves content, makes the document more appealing, and can tell an additional story all by itself. If we do not set this up with a storyboard, trying to retrofit a graphic back into your text simply because you need one is a frustrating exercise at best. Set up the section visually with a good graphic.

My new course of action

- I am going to use storyboards on every project I work on, and I am going to make them fun!
- I am going to work with my authors so they appreciate the time I am saving them by driving the themes and the strategies up front instead of an afterthought.
- I will mentor my authors so that they can transition from the storyboard to their first draft seamlessly.
- I will present my solution in storyboards so that all the authors and writers know this upfront and can get a head start with their responses.
- I will add themes, strategies, and discriminators so that their section sizzles and leaps off the page. We owe this to our writers.
- I will make every effort to include multiple types of graphics so that visually my storyboard appeals to evaluators, and they want to continue through our document.
- I will use storyboards on every proposal!

APMP Mission and Code of Ethics

Mission

- 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."
- The core of our mission and our organization is proposal related. The broader mission of APMP includes the entire new business acquisition cycle, while maintaining proposals as the cycle core. New business acquisition encompasses marketing, business development, and acquisition activities from early marketing positioning through negotiations and award. APMP recognizes that, as proposal professionals, all members are dedicated primarily to the successful execution of one or more of the diverse activities involved with proposal execution.
- We further recognize that including new business acquisition as a part of our mission provides an opportunity to expand knowledge and capability for our members, providing them with information regarding the entire business acquisition cycle.

Code of Ethics

Members of the APMP are expected to:

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

ColorCraft™
Great Impressions

APMP Announces New Publication Partnership in Effort to Go Green:

Introducing ColorCraft Printers

In its continuing efforts to go green, APMP and ColorCraft printers in Sterling, VA have a new publication partnership. APMP has chosen ColorCraft because of its longstanding efforts to reduce its carbon footprint both through its operations and through the use of renewable resources.

ColorCraft is proud to be Forest Stewardship Council (FSC)-certified. What does that mean? As the name implies, the FSC helps watch over our trees. This worldwide non-profit organization, founded in 1993, certifies sustainable forestry practices and encourages the use of FSC-certified paper. It has developed standards emphasizing environmentally- and socially-responsible criteria to certify and label wood products from well-managed forests. The FSC tracks the wood from the forest of origin all the way through the chain of custody to where the product is sold. An FSC-certified product has been harvested and produced in a stringently eco-sensitive manner. This offers customers around the world the ability to choose products from socially and environmentally responsible forestry.

The APMP Journal is now printed with vegetable inks on Forest Stewardship Council-certified 50% recycled paper that is 25% post consumer waste.

Please continue to help us in our green initiatives by recycling your Journal rather than throwing it away.

Or keep it forever.

We like that too.

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

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. Retiree and (full-time) student membership dues are $75.00 (USD) per year. 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 Suzanne Kelman at (714) 392-8246 to make arrangements for payment.

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

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Advertising Rates and Guidelines

The following rates are effective through June 30, 2010:
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 2011 will be published in the Fall/Winter 2010 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 Ali Paskun at (410) 456-5623 or email apaskun@comcast.net.

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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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.

Guidelines for Authors

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:

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 (Managing Editor, Assistant Managing Editor, and two anonymous outside reviewers). 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.

Acceptance

When appropriate, authors whose articles or book reviews have been accepted for publication will be responsible for incorporating comments from the Editorial Advisory Board into the final version of their articles. Once an article or book review has been accepted for publication, it will be subject to routine copyediting by the staff of The Journal. Copyediting is an internal process and consequently copyedits will not be reviewed by authors.

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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.

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Designed to Succeed:

Strategies for Building an Effective Proposal Management Internship Program

Internships are a popular way to recruit professionals in the business world, but few companies today recruit interns for proposal development. How can companies create a successful proposal-management internship programs?

By Roger Munger, Ph.D.

With its wide range of disciplines and industries, the proposal profession has no single academic major or program from which to recruit new proposal management professionals. Internships can play an important role in recruiting and training the next generation of proposal professionals. Employers report that successful internship programs help them to recruit qualified new hires, and students who complete an internship often report that their first job after college is at the place where they interned.

This article describes how to build an effective proposal-management internship program. It provides practical advice on how to provide a meaningful experience for the intern, how to plan the internship experience, and how to evaluate the internship program. It describes steps to design a successful proposal management internship program and covers practical tips for getting the most out of that program. If all goes well, it may lead to your training and hiring of a new colleague in the field of proposal management.

"My advisor just told me I need an internship in order to graduate this semester. I'm only available on Thursday afternoons from 1-3, I need it to pay at least $17 per hour, and, ah, I was hoping for something to do with poetry."

As the internship coordinator for an English department, I regularly work with students seeking an internship to meet a degree requirement, add to their resume, explore a career option, or just get their foot in the door.

As professional proposal managers, you have likely been frustrated when you interview newly minted college graduates. Some students, such as the one quoted above, are misinformed about the workplace in general and internships in particular. Most do not have any academic coursework in proposal development. Many only have workplace experience that involves asking customers whether they want their 16-ounce, double-shot, skinny, milky way hot or cold.

One strategy to improve your applicant pool for entry-level positions and to attract new hires with the skills you seek is to sponsor an internship at your company. Unlike classroom-workplace collaborations, such as service-learning partnerships where students enrolled in a specific course complete projects for community partners (Munger 2002), an internship places students in your offices, under your supervision, to learn the ropes of proposal development for an entire academic term (i.e., a semester or quarter). An internship is not a slave-labor arrangement—if you have some work that needs to be done quickly and you do not have time to do it yourself, consider a temp agency to meet your short-term personnel needs. An internship requires a learning component (Somerick, 2001), and interns require training, mentoring, constructive feedback, and evaluation. Sponsoring an intern at your organization therefore requires a commitment on your part to help the intern learn while he is at your organization (Robart and Francis, 2001).

If it takes so much effort, why do it? Because internships, which are a form of on-the-job training, are win-win situations for both the student and employer. Students win because they learn new skills (Cook, Parker, and Pettijohn, 2004; Tovey, 2001). Your organization wins because you get inexpensive labor, an enthusiastic worker, fresh ideas, and a 10-week or 16-week look at a possible new recruit (Rothberg, 2006; Hickey, 2003; Liddy and Thomas, 2001; Lurkis, 2001). Companies also benefit from the ongoing relationship with the university offering the student academic credit (Sutliff, 2000). People who agree to supervise interns gain management experience (Farinelli and Mann, 1994) and an opportunity to contribute to the education of the next generation of proposal professionals.

Planning For and Hiring an Intern

When establishing an internship program at your organization, your first tasks are to plan the internship experience and to locate students with the background you seek and an interest in exploring your profession as a career option. Finding the right student for your internship can be difficult and time consuming. Internships can fail for many reasons. Sometimes the intern is not temperamentally suited for the position. Sometimes the faculty internship coordinator fails to give you and the intern the necessary support (for advice for students and internship coordinators, see Munger, 2006). In some cases, organizations are culpable. Companies can avoid sabotaging their internship program

> "Locate students with the background you seek and an interest in exploring your profession as a career option."

by avoiding rookie mistakes, figuring out the details, and looking for interns in the right places.

Avoid the Top Three Rookie Mistakes

Interns, just as new hires, fail for many reasons. However, in my experience as a faculty coordinator of more than 600 internships, I find that most internships at new sites fail for one of the following three reasons:

1. **The organization hires too many interns, too fast.** I had a person contact me and ask for 10 interns, with no history of supervising any interns at his company. Interns sometime sound like the solution to your company's problems. They might be. However, people routinely underestimate the work involved in supervising an intern because they need feedback and mentoring. Having too many interns dilutes the experience for each and creates too much work for you. Start small, and build on your success. After you have successfully supervised one intern, then consider adding one or two more interns to your program.
2. **The intern is a poor fit for the organization.** I have had companies offer students internships based solely on the fact that the students replied to the email message announcing the internship opportunity. Not surprisingly, such perfunctory screening led to later problems. You can prevent many problems by carefully screening prospective interns to see if they have the industry-specific skills you seek and the soft skills needed to fit in and succeed at your organization. Do not become exclusively focused on technical know-how: a bright student can quickly learn a different software program on the job or some other technical skill. However, communication skills, honesty, integrity, and teamwork skills will have an equal or greater impact on the intern's success at your company. Weed out students merely seeking to fulfill a requirement for graduation, and focus on those students who demonstrate a commitment to helping your company.
3. **The intern has no specific work to do.** When interns complete their online application for academic credit, I can usually spot potential problems when I read the box listing the intern duties. Duties as assigned, to be decided later, writing, [blank], etc. all suggest that the intern, and, perhaps the intern supervisor, do not know what exactly the intern will do. When this happens, interns often find themselves texting their friends while waiting for their already busy supervisor to figure out a project for them (Karsh, 2008). The internship fizzles because there just is not enough meaningful work for the intern to do. On the other hand, the best internship situations involve the student and the intern supervisor discussing what work will be done, agreeing on responsibilities, determining learning objectives, and then putting it all in writing before the first day of the internship. The faculty internship coordinator can assist in this process.

Figure Out the Details

Before you start looking for an intern, you need to get answers to several questions:

What legal issues pertain to working with an intern? Do not let the thought of legal action prevent you from hiring an intern. Thousands of businesses routinely hire interns each year, without incident. Your best approach is to discuss internships with your company's legal counsel. For a concise discussion, see Kaplan's overview at http://www.sahrma.org/images/studentchapter_legal_issues.pdf. A faculty internship coordinator can help you manage the legal risks.

Who will supervise the intern? The best intern supervisors are enthusiastic about their profession, have the time in their schedule for this extra commitment, and are willing to mentor the student during the internship. To provide useful feedback and guidance, intern supervisors must also have professional experience with the skills the intern is expected to learn and demonstrate.

When will the internship take place? Academic internships generally must take place during the academic term in which credit is being offered. That is, students cannot intern in the summer and then register for internship credit in the fall. In addition, universities require a specific number of hours to be worked for each credit hour. For example, a 3-credit hour internship might require a student to intern for at least 150 hours during a 16-week semester. Check with staff at the university's career center for deadlines and hour requirements.

Will the intern be paid? When asked by employers seeking an intern, here is how I respond: "Please pay your intern. Compensating interns shows them that you value their contributions and are serious about your internship program. Paying an intern is the ethical thing to do, and it reflects positively on your profession and your company. The best and brightest interns look for paid internship opportunities. Even if you can't pay an hourly wage, consider offering an honorarium or stipend at the end of the internship." Although some interns will work for free in this economy (Skowronski, 2009), unpaid internship programs must meet six strict standards outlined under the Federal Fair Labor Standards Act. For a list of the standards and a detailed discussion on whether unpaid internships are legal, see Franzen's September 7, 2008 blog entry (http://www.onedayoneinternship.com/blog/are-unpaid-internships-illegal/#comment-1130). Bottom line: pay your intern at least minimum wage.

Where will the intern work? Work arrangements for internships can take many forms from the traditional arrangement in which a student works on site in a cubicle or office for a set number of hours each week; to a telecommuting arrangement in which the student and supervisor work exclusively from home using the Internet, email, and phones; or some hybrid of on site and telecommuting. Regardless of the arrangements, you should put in writing any expectations for hours spent on and off site, frequency and methods for communication, work-related expenses, use of company equipment (e.g., software), and handling confidential materials.

What work will the intern perform? Rather than a vague "help us around the office," specify a project or series of projects on which you want to intern to work (Ryan and Krapels, 1997). Thinking in terms of projects will also help you accurately estimate the hours needed for each internship. All internships involve gofer or grunt work (e.g., filing, answering the phones, making coffee runs, copying, etc.). However, the majority of the internship hours must be directly related to the focus of the internship. The best internships give students a broad introduction to the profession and the company, often moving them from department to department as they learn new skills.

Recruit in All the Right Places

Once you have determined the tentative details of your internship program, you are ready to advertise the internship opportunity. Using a shotgun approach to recruiting an intern (e.g., peppering job sites and email lists) might result in the discouraging task of having to sift through hundreds of marginal applications. A thoughtful, targeted intern recruiting campaign will usually result in a manageable pool of qualified students from which to choose. Consider recruiting students using the following resources:

University career centers. Staff at career centers will help you connect with current students, recent graduates, and alumni. You will also have opportunities for participating in career/job fairs. Before advertising your internship in the center's online database, ask to speak to the University's Director of Internships (or similar job title). This person can answer your internship questions and refer you to faculty coordinating internships for specific majors.

Department internship coordinators. Although specifics vary, most academic departments have a faculty member responsible for coordinating internships. This person can help answer your questions and help you advertise your internship opportunity. For example, I maintain a database of students seeking an internship. When an employer contacts me with an internship opportunity, I can quickly email the details to students who possess the skills the employer seeks.

Proposal and advanced technical/business writing courses. Browse through your local university's schedule of classes, looking for proposal courses or advanced (senior or graduate level) technical communication or business writing courses. Contact the instructor to discuss your internship needs. You might be able to visit the course and both educate the class about your profession and discuss your internship opportunity. Plan ahead. If you are looking for an intern in the fall, visit classes in the spring.

Working With Your Intern

After you have selected one or more interns, it is time to introduce them to your organization, your products, and your work processes, and put them to work. Once your interns are up to speed, do not forget about them. Keep communication channels open, and take them under your wing.

Orient Your Intern. The most important factor in determining whether an intern can quickly start making meaningful contributions to your team is the quality of your intern orientation. To prevent information overload, try breaking your intern's orientation into a few short sessions spread out over the first few days. At a minimum, your orientation activities should cover the following topics:

- Physical facility layout, including restrooms, break rooms, and supply room
- Workplace harassment and safety policies
- Company mission and goals
- Company products, services, and important clients
- Names, titles, and job functions of key personnel with whom the intern will interact (or should know about, such as the CEO)
- Network, server, copier, and telephone (office and cell phone) use
- Frequently used and proprietary software applications
- Workflows, processes, document types, and corporate style guide.

For a more detailed discussion of intern orientation, see Munger, Pennington, and Brooks, 2009.

Maintain Regular Contact. When interns contact me with concerns about their internship, it usually boils down to a lack of communication: the intern and supervisor stop communicating. You should not assume that no news is good news nor should you assume that your intern will contact you if he or she has concerns. Most interns crave interaction, feedback, and positive reinforcement. On the other hand, they are anxious to do a good job (Gaitens, 2000), reluctant to make waves, and hesitant to draw attention to themselves; it is the first day of school all over again.

Intern Culmination Checklist

- ✔ About 2-3 weeks before the end of the internship, ask your intern for the specific date of his last day.
- ✔ Contact the faculty internship coordinator to confirm what materials he needs from you and the deadline to submit these materials. You might be asked to complete an evaluation of your intern or sign off on the intern's activity log.
- ✔ Ask the intern to submit a wrap-up report a few days before he leaves. In this report, ask your intern to document the status of any unfinished projects, list the names and locations of important print and electronic files, and alert you to any ongoing tasks/business that you will need to complete.
- ✔ Ask the intern for contact information for classmates who might be interested in interning at your company, and who he thinks would succeed in the position. Contact the faculty internship coordinator if you want to advertise another internship opportunity.
- ✔ Schedule an exit interview with your intern. At the interview, review the intern's performance, discuss any nondisclosure agreements, and make sure your intern knows what documents he can and cannot use in a professional portfolio. Confirm the intern's contact information and, if appropriate, offer to serve as a reference.
- ✔ On the last day, collect all company ID badges, uniforms, keys, handbooks, files, proprietary materials, and property (e.g., credit cards, laptops, cell phones). Remember to deactivate your intern's passwords and access codes.
- ✔ Ask your intern to complete an evaluation of his internship experience.
- ✔ Update your Web site, if your intern's profile or contact information is listed.
- ✔ If appropriate, offer your intern a permanent position.

Figure 1.

Having an Intern Culmination Checklist will save you and your intern time. It can also be based on your company's policies.

Five ways to stay in regular contact with your intern are to:

- Schedule regular communication opportunities. Require a brief update via email each Friday. Ask that they stop by your office or phone you at least once a week.
- Use a variety of communication methods. If you primarily interact via email, for example, talk over the phone a few times. Send an occasional text message.
- Meet for lunch, just to chat (no agenda).
- Schedule at least a few face-to-face meetings, even for interns who primarily telecommute.
- Provide both written, formal feedback and quick, informal feedback on their performance several times during the internship.

Mentor Your Intern

Many people agree to supervise an intern because they wish to participate in the student's education. Some people use this as an opportunity to *pay it forward*, to repay the help they received early in their career by helping a rookie. Others supervise interns to advance their profession and train the next generation of proposal developers. Some see it as an opportunity to hone their management skills, while others just get stuck doing it. Regardless of your situation, your intern is looking to you for career advice, formal and informal professional development, and encouragement. Admittedly, that is a tall order. Three simple ways you can mentor your entry-level intern include:

- **Providing a behind-the-scenes view of your profession.** That is, include your intern in both interesting and mundane activities that he would usually have little opportunity to witness. Debrief your intern afterward, commenting on what you found valuable and what was a waste of your time.
- **Telling stories of your successes and failures.** Build rapport with your intern, and put a human face on your profession by informally sharing anecdotes, case studies, and examples from your career.
- **Asking for their opinion.** Sketch out real workplace problems with which you are wrestling. Help them identify the important factors and key players. Ask what they would do and why.

Concluding an Internship Experience

Just as locating the right student is critical to the success of your internship program, concluding an internship experience is equally important. You cannot just shake hands at the end of the workday, say thanks, and watch a potential new hire walk out the door—or worse, let the intern just disappear one day. You need to have a structured culmination to any internship experience. The checklist in Figure 1 is good for concluding an internship:

Evaluating Your Internship Program

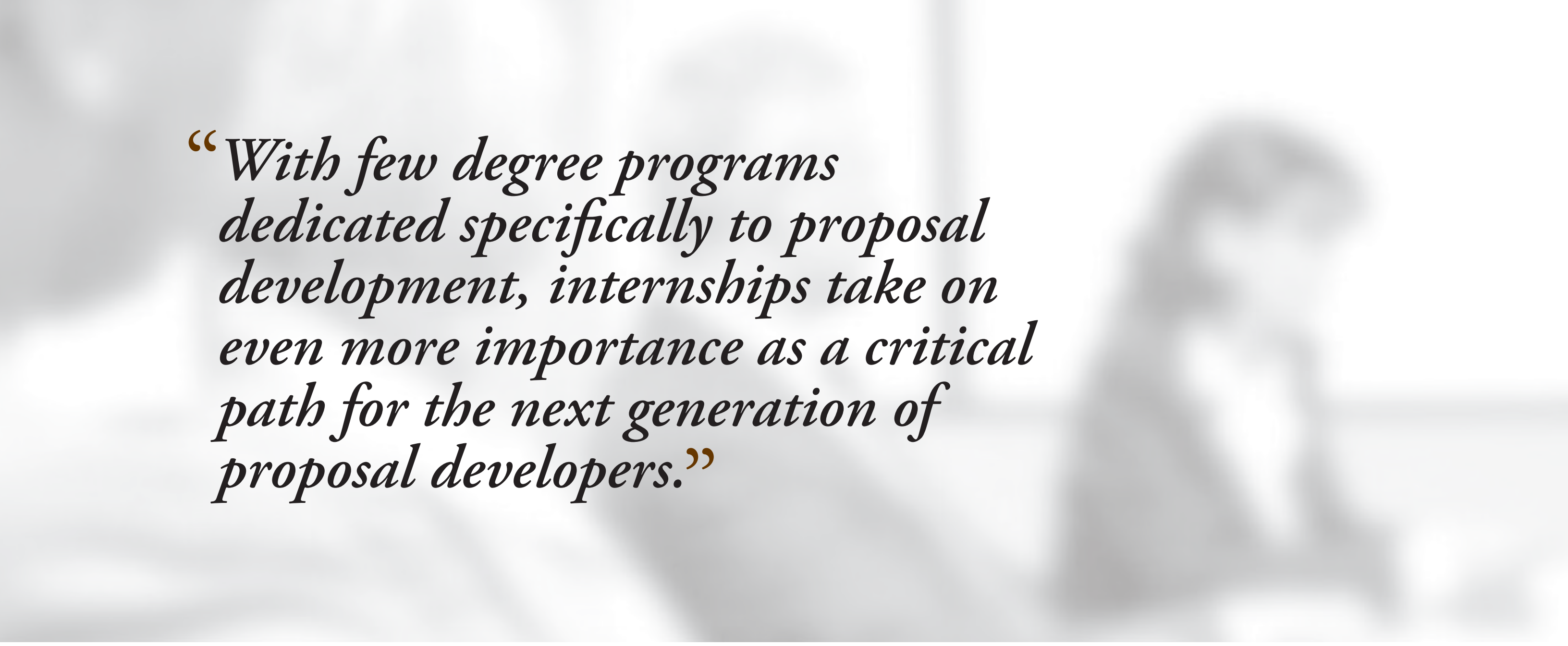
How do you know if your internship program is a success? The obvious answer, "If you later hire your intern full-time and he becomes a contributing member of your team, then your internship program is working." However, an internship program can be successful and not result in a new hire—you might not even have a position available when the internship concludes. From an academic perspective, internships are successful when interns learn new skills, gain industry experience, confirm a career path,

Rating an Intern's Workplace Performance					
Behavior	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Demonstrated a professional approach to the internship					
Worked well with others in my organization					
Produced high quality work					
Was well prepared for the internship					
Helped my organization meet its goals					
Was flexible and adapted well to change					
Provided fresh ideas					

Figure 2. Rating an Intern's Workplace Performance.

Tracking Intern Learning Table						
Behavior	Significantly Improved	Improved	No Chage	Declined	Significantly Declined	Not Applicable
Oral Communication						
Written Communication						
Teamwork (works well with others)						
Professionalism						
Interpersonal (relates well to others)						
Work Ethic						
Motivation and Enthusiasm						
Job Knowledge						
Attention to Detail						
Reliability						

Figure 3. Tracking Intern Learning Table.



> *"With few degree programs dedicated specifically to proposal development, internships take on even more importance as a critical path for the next generation of proposal developers."*

and expand their professional network. From a business perspective, internships are successful when an intern contributes to the company bottom line and leaves with a positive impression of the company and profession.

As soon as your intern leaves, you might have the tendency to want to forget the problems, briefly applaud the successes, and move on to the next intern. This is a mistake. To improve your internship program, you will need to gather some data on successes and mistakes from four sources:

- **Your intern.** Ask your intern to evaluate his experience, including the effectiveness of your orientation, amount and usefulness of feedback, clarity of work expectations, and opportunities for training and networking. Although Likert-type survey items (e.g., strongly agree, agree, etc.) generate numbers you can compare across interns, free response and open-ended follow-up questions (e.g., how so? in what ways? explain) often provide the best feedback. A few questions that I have found to be very illuminating when evaluating an internship program include:
  - Based on my internship experience, I would recommend that other students participate in this internship program. [Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree] Please, explain your answer.
  - I received useful feedback from my supervisor on my performance during this internship. [Strongly Agree, Agree, Neutral, Disagree, Strongly Disagree] Please, explain your answer.
  - How could our company better support interns participating in our internship program?
- **Workplace colleagues.** Ask two-to-three colleagues who worked closely with your intern to assess the intern's strengths and weaknesses. Focus on determining how well prepared the student was for the internship and what learning took place during the internship. Both types of data will help you refine your recruiting process and intern activities. You can adapt the tables in Figures 2 and 3 used by Boise State University to assess intern learning and performance.
- **Yourself.** Take a few minutes to reflect on your performance as your intern's supervisor, focusing on how well you communicated, the amount and quality of your feedback, and your availability. Write down what worked and what changes you want to make for the next internship.
- **The faculty internship coordinator.** Ask the faculty internship coordinator for feedback on the materials you provided, such as intern updates and end-of-semester evaluations. Ask for the coordinator's opinion on how well the internship worked as well as suggestions for improvement. If interns completed any reflective essays or evaluations, ask to have copies for your files.

For examples of evaluation tools and specific questions to ask, search the Internet for "intern evaluation." You can also take advantage of easy-to-use and free or low-cost online survey tools such as SurveyMonkey.com and Qualtrics.com. Such tools allow different levels of confidentiality that might encourage more honest responses. Your evaluation can be as elaborate or simple as you wish. The point is, successful internship programs usually do not just sprout up overnight. Good internship programs are works in progress, responsive to new ideas, practices, student populations, and changes in your profession.

Conclusion

I have described a demanding set of tasks to build an effective internship program. Sponsoring an intern is not for everyone nor every company. However, those who choose to build an internship program stand to reap personal and professional rewards. With few degree programs dedicated specifically to proposal development, internships take on even more importance as a critical path for the next generation of proposal developers. Rather than a burden, look upon supervising an intern as a privilege that your profession has entrusted to you. Using the strategies I have discussed, you can take an active role in preparing students to enter your profession with the skills necessary for success. As a result, the proposal profession will be well positioned to compete in the today's business world and in the future.

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the Very "Unofficial" APMP Glossary

By Chuck Keller, AF.APMP

Illustrations by Steve Cummings, Colleen Jolly and Lakin Jones

The APMP provides two official glossaries for proposal and business development professionals. They are the:

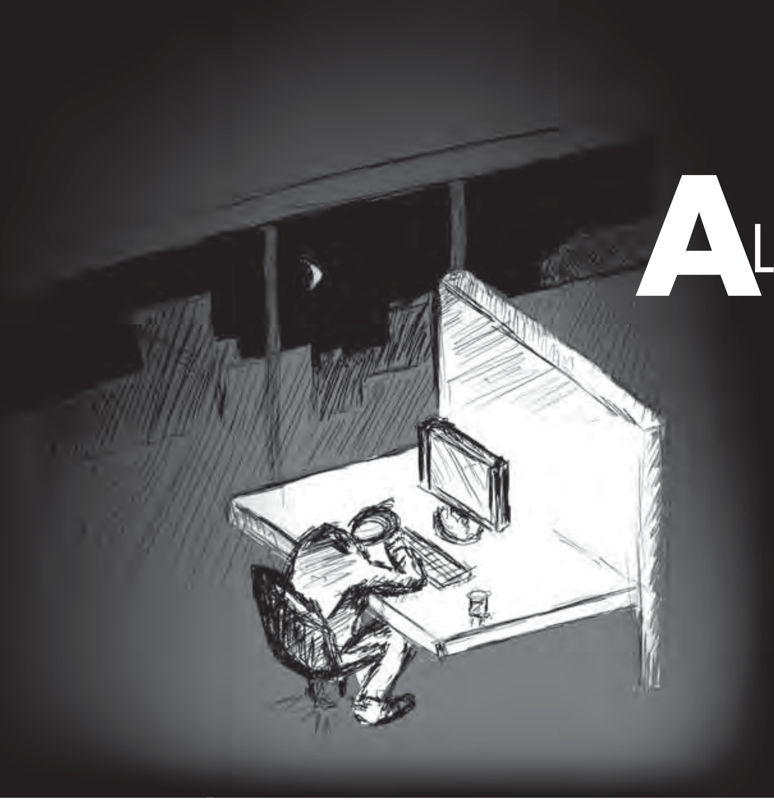
- APMP Foundation Level – Glossary of Terms—It defines terms that can help you pass the exam for Foundation Level Accreditation. It is available on the APMP Website (www.apmp.org/fv-407.aspx.)
- APMP Glossary—It defines acronyms and acquisition and contracting terms used for US Government, commercial, and international procurement. The glossary is part of the BD-KnowledgeBase™, also known as the APMP Body of Knowledge (BOK). The BOK was developed by the APMP and the Business Development Institute (BDI) and is available to APMP members in the member-only section of the APMP Website. (The BOK also contains the accreditation glossary.)

As helpful as these two glossaries are, I have written another glossary for the APMP—albeit a very unofficial glossary. Like the accreditation and BOK glossaries, my glossary defines proposal and business development terms. Unlike these glossaries, my effort provides definitions injected with tongue-in-cheek humor. Even with its humorous flavor, I believe my glossary can be beneficial for I agree with Mark Twain who claimed: "Humor is the good natured side of truth."

My glossary is not meant to replace the accreditation or BOK glossary—call it a supplement glossary if you will. Furthermore, my glossary may not help you pass the Foundation Level exam, which tests your basic knowledge of proposal best practices. It might, however, teach you about "worst" proposal practices that should be avoided—and in the process amuse and entertain you. (When is the last time you saw the words "amuse" and "entertain" in a sentence about proposal and business development?)

So from A to Z, here is my very unofficial APMP glossary, which reflects contributions from Bill Andre, Keith Propst, and David Sotolongo, my friends and APMP colleagues.

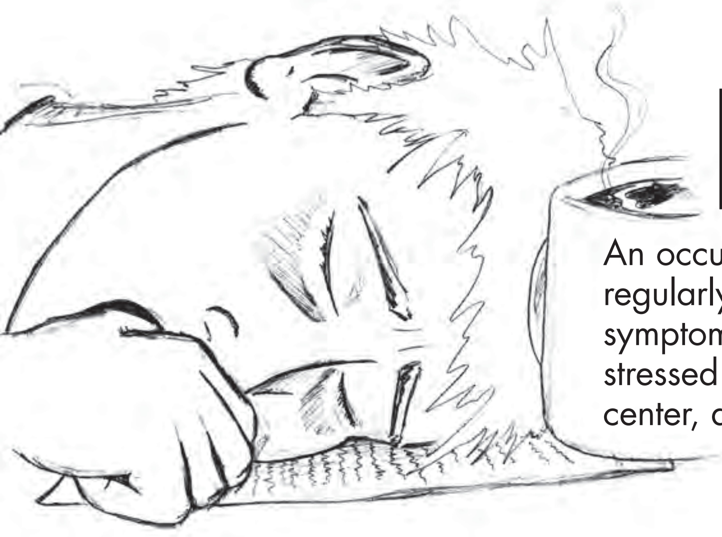
By the way, I encourage you to check out the resources available in the APMP BOK. Also, good luck with your Foundation Level exam regardless of which glossary you study.



ALL Nighter

An all-night work session to meet a proposal deadline; leads to flashbacks of your college study days (and party all-nighters, if you can remember them) and to recurring nightmares of your missing the proposal deadline while standing naked next to a copier that broke down before it could finish copying Copy #14 of 21 of the technical volume.

TERM	DEFINITION
ACA	Assumed Contract Award—an RFP's guess about when the proposed contract will be awarded; presumably provided to help offerors plan their proposal response; a date that should have at least four-to-six months added to it.
APMP	Association of Proposal Management Professionals—the tongue-twisting name of a professional organization for those who perform any phase of business acquisition, not just proposal management.
All Nighter	An all-night work session to meet a proposal deadline; leads to flashbacks of your college study days (and party all-nighters, if you can remember them) and to recurring nightmares of your missing the proposal deadline while standing naked next to a copier that broke down before it could finish copying Copy #14 of 21 of the technical volume.
Alternate Proposal	A proposal submitted when you cannot meet the RFP requirements; a proposal that shows you think you have a better solution than the prospective customers have requested in their RFP and/or your belief that they really do not know what they want.
Appendix	A useful part of the proposal for providing information to circumvent proposal page limitations imposed by the RFP or to data dump unnecessary information in the proposal. (See also data dump, attachment, and enclosure.)
Archive	The place you keep files of old proposals or other documents for use as boilerplate in new proposals; the challenges being (1) where to find the file, and (2) how to tailor it for the new proposal. (See also boilerplate.)
Attachment	A useful part of the proposal for providing information to circumvent proposal page limitations imposed by the RFP or to data dump unnecessary information in the proposal. (See also data dump, appendix, and enclosure.)
B&P Work Order	An approved bid and proposal (B&P) work order for charging proposal work; a magnet to direct workers who use it only to attend proposal meetings at which they do not expect to do any real proposal work. (See also kick-off meeting.)
BAFO	Best and Final Offer—a strategy of high-balling your original price in the proposal with the plan to cut the price when asked by the prospective customer for a BAFO.
Bait and Switch-itis	An ailment marked by offering key personnel in your proposal, especially program/project managers, with the intent of changing these key personnel after you get the contract because they really will not be available for the job. (See also program/project manager.)



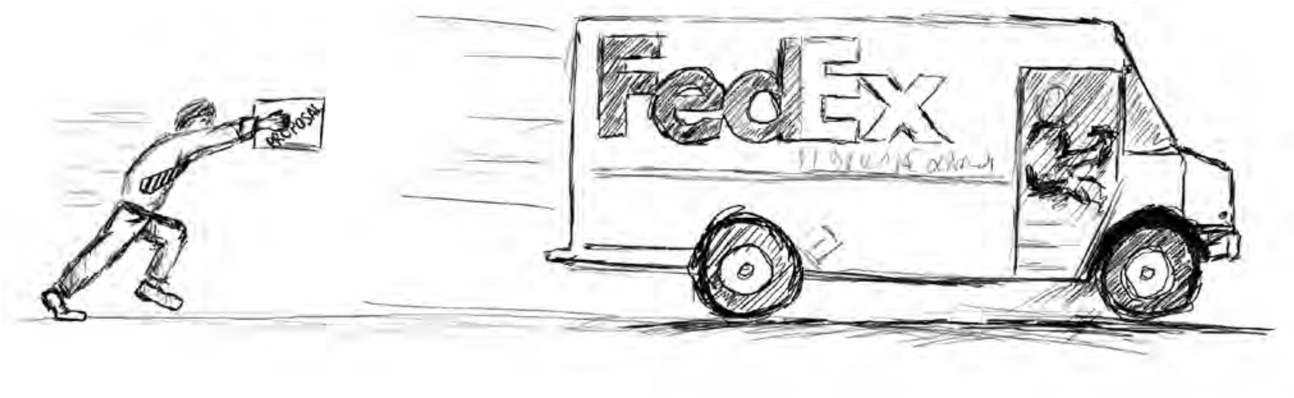
Burn-Out

An occupational hazard for proposal professionals regularly forced to work 12-hour days and weekends; symptoms include nervous tics, indigestion, bloodshot eyes, stressed family relationships, little life outside the proposal center, and career changes.

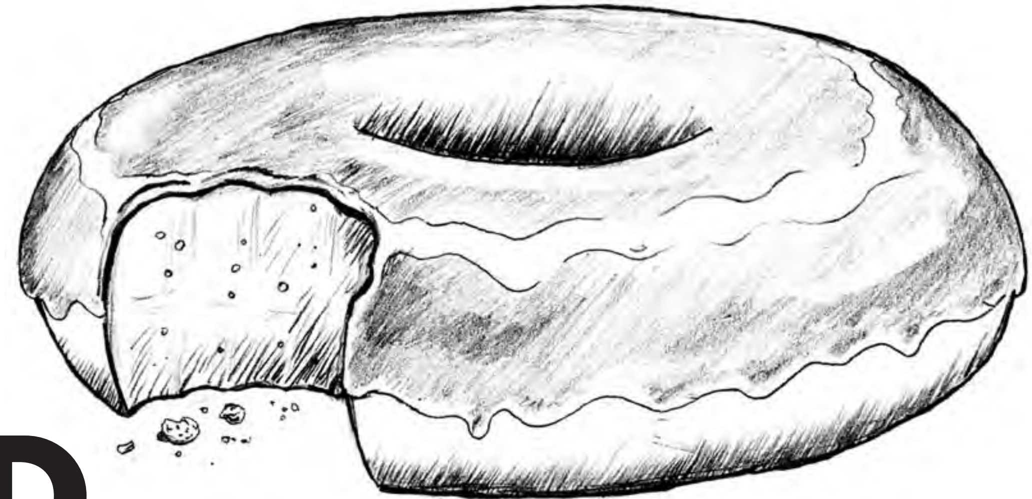
TERM	DEFINITION
Benefit	A description of how a feature of your product/service/approach will benefit the prospective customers—a link often missing in a proposal, causing them to conclude the benefits on their own.
Best Value	A procurement approach that does not use the proposed price as the top evaluation factor for awarding a contract, despite the fact that price is always an important factor.
Bid Decision	A decision to bid on a contract, often made based mainly on the ability to provide the product/service, regardless of the likelihood of winning the bid; a decision that can be supported by the urging of marketing/ sales reps looking to meet their sales quotas.
Bidder Conference	After RFP release, a conference held by prospective customers that provides little information outside what is already in the RFP and attended by prospective bidders afraid to ask questions because they do not want to divulge competitive information to their possible competitors in attendance; often attended by marketing/sales reps who have little or no knowledge of the RFP or involvement with those who will write the proposal.
Black and Blue Team Review	A proposal review that inflicts emotional and physical pain on the proposal team.
Blue and Orange Team	Has nothing to do with proposal development: the 2008 BCS and SEC football championship team of my alma mater, the University of Florida (with the school colors of blue and orange)—Go Gators!!! Editor's note: Actually, blue and orange teams are creeping into the proposal review process, which is becoming increasingly multicolored.
Blue Team Review	A proposal review that inflicts emotional pain on the proposal team.
Boilerplate	Text and graphics from old proposals and other documents; often used in a new proposal with little or no tailoring for the new RFP or an evaluation of content accuracy. (See also archive and over expectation-itis.)
Book Check	A final page-by-page check of all proposal copies to be sent to the prospective customer; used to verify the presence and quality of all printed pages; unfortunately can be used as a last ditch chance to edit and proof the proposal and to question the proposed solution and price leading to last-minute proposal revisions.
Bottom-up Pricing	A proposal strategy for pricing based on what you think the price should be and not what the prospective customer thinks it should be or has the budget for.
Broken Referral	A referral in proposal text pointing the proposal evaluator to Figure 2-7 for an org chart and Sect. 2.1 for the management approach, when there is no Figure 2-7 and Sect. 2.1 describes past performance; similar to a broken link on a web site.
Burn-out	An occupational hazard for proposal professionals regularly forced to work 12-hour days and weekends; symptoms include nervous tics, indigestion, bloodshot eyes, stressed family relationships, little life outside the proposal center, and career changes.

Chasing the FedEx Truck-itis

An ailment marked by the desperate, last-minute dash to get your proposal to a shipping service before it closes; if untreated can become a more virulent strain called chasing the flight reservation-itis.



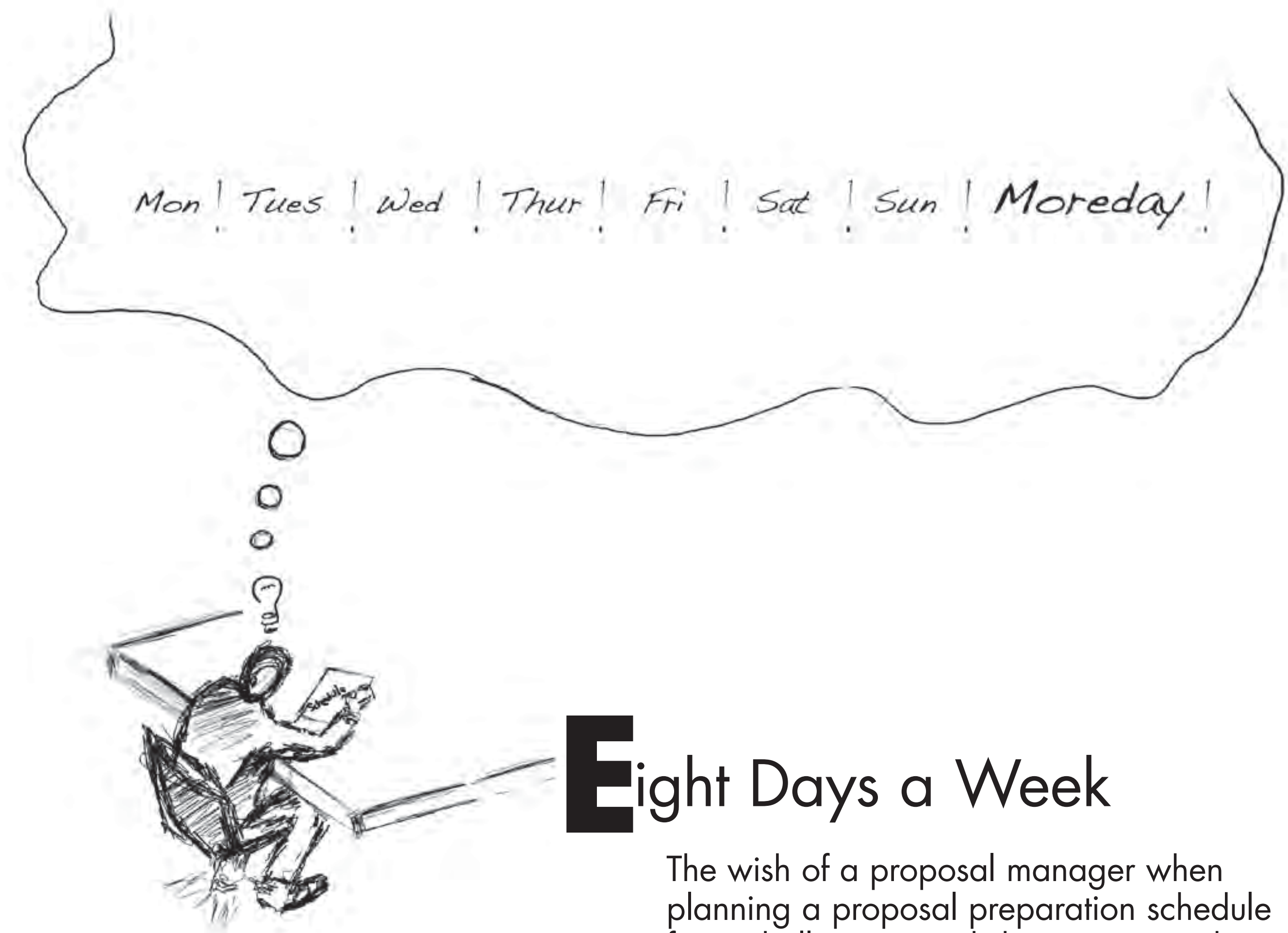
TERM	DEFINITION
Capture Plan	A proposal strategy to win a contract often based on your experience of having provided the product/service in the past and not on what you propose to do for providing the product/service in the future.
Chasing the FedEx Truck-itis	An ailment marked by the desperate, last-minute dash to get your proposal to a shipping service before it closes; if untreated can become a more virulent strain called chasing the flight reservation-itis.
Clarification Request	During the evaluation of your proposal, a prospective customer request to clarify a statement in your proposal that does not make sense; a formal way to ask: "Say what"?
Clutched Hand-itis	An ailment marked by the stubborn reluctance of proposal writers to release their section draft for a review or final production.
Coffee	One of the three basic food groups for a proposal development/review team diet. (See also pizza and donut.)
Competitive Assessment	An assessment of the strengths and weaknesses of your competitors for developing strategies to offset their strengths and exploit their weaknesses, often based on underestimating competitor capabilities and overestimating yours. (See also drinking your own bathwater-itis.)
Competitive Range	Decision point in a procurement process in which prospective customers eliminate proposals that do not have a chance of winning, thereby saving them time from having to mess with them anymore.
Compliant	An adjective you want associated with your proposal; opposite to non-compliant, an adjective you do not want associated with your proposal. (See also responsive.)
Consultant	A temporary proposal employee hired by companies that do not have the resources, time, skill, or desire to write the proposal themselves, especially when the proposal is due this Friday and the RFP has been out for three weeks.
Copier Attitude-itis	An ailment marked by the breakdown or paper jam of a vindictive copier when it senses your anxiety to get proposal copies with a looming proposal deadline; related to a strain that inflicts printers called printer attitude-itis.
Cross-training	Training that would require RFP writers to work on at least one Federal Government proposal before they are assigned to write a Federal Government RFP and vice versa for writers of Federal Government proposals.



DONUT

One of three basic food groups of a proposal development/review team diet. (See also coffee and pizza.)

TERM	DEFINITION
Data Dump	Proposal content that is not requested by the RFP or helpful to the prospective customer; included because it is readily available and you think it makes you look smart; (See also appendix, attachment, and enclosure.)
DATQIYDWTA	Don't Ask The Question If You Don't Want The Answer—good advice when compiling questions about the RFP SOW specifications or proposal instructions; a corollary of IETAFTIITGP ("It is easier to ask forgiveness than it is to get permission," credited to Grace Hopper, a computer pioneer.)
Dear John Letter	A letter from a US prospective customer stating that you did not win the contract; for non-U.S. procurements: "Dear Juan" (Spanish), "Dear Johan" (German), "Dear Jean" (French), and "Dear Gianni" (Italian).
Debrief	A discussion with the prospective customers to find out why your proposal won or lost, featuring their reluctance to give any meaningful feedback as they try to veil their selection process, met by your defensiveness over losing or your bewilderment over winning.
Deficiency Notice/Report	A prospective customer's way of giving you a chance to fix a deficiency in your proposal that should not have happened if you had done the proposal correctly in the first place.
Differentiators	Features and benefits of your best-in-class solution that you think set you apart from the same features and benefits of your competitors' best-in-class solutions.
Diminishing Return-itis	An ailment marked by the point late in the proposal development process in which additional work is not justified by the resulting proposal improvement; afflicts perfectionists who try to develop the perfect proposal when there is no such thing as a perfect proposal.
Donut	One of three basic food groups of a proposal development/review team diet. (See also coffee and pizza.)
Draft RFP	A document released by prospective customers to get advice from prospective bidders for revising poorly written product/service specifications or proposal instructions in the draft; allows prospective bidders to get a head start producing a proposal based on draft product/service specifications and proposal instructions that get changed or deleted in the eventual RFP.
Drinking Your Own Bathwater-itis	An ailment of overconfidence in your ability to produce a winning proposal, marked by the belief that the contract is yours to win because the prospective customer really wants you to win and there is no way your competitors can win; has a related strain called eating your own dog food-itis that affects overconfident canine lovers.
Due Date	The prospective customer deadline for proposal submittal; the most important requirement in the RFP and one of the first requirements sought by the proposal manager.



Eight Days a Week

The wish of a proposal manager when planning a proposal preparation schedule for a challenging and short-turnaround proposal; a song by the Beatles.

TERM	DEFINITION
Eight Days a Week	The wish of a proposal manager when planning a proposal preparation schedule for a challenging and short-turnaround proposal; a song by the Beatles.
Enclosure	A useful part of the proposal for providing information to circumvent proposal page limitations imposed by the RFP or to data dump unnecessary information in the proposal. (See also data dump, appendix, and attachment.)
Exceptions And Deviations	RFP terms, conditions, and specifications that your proposal states that you cannot or will not meet; the most competitive response about which is “none”; also, the type of activity you do in Las Vegas that should “stay” in Las Vegas.
Executive Summary	A proposal introduction/summary section or volume often written by someone with little or no knowledge of the RFP or what is in the rest of the proposal; often the target of scathing review critiques (because the reviewers are executive summary experts) leading to the frequent assignment of a new author to re-write it until somebody finishes it the day before the proposal is due.
Extension	Prospective customer extension of the proposal due date, caused by massive or late changes to the RFP, or the pleas of prospective bidders for more time to develop their proposals.
Extensive	A proposal term used to quantify something that has happened often, when you do not know exactly how often. (See also numerous.)
Eye Candy	Proposal graphics used because they look good, not because they do any good.
Feel Your Pain-itis	The ailment marked by telling the prospective customer that you understand the importance of providing the product/service with little or no explanation of your approach for doing so or the benefit of that approach.

Fluff

Superfluous proposal content that says nothing about your proposed approach to providing a product/service or the benefit of that approach. (See also proud and pleased.)

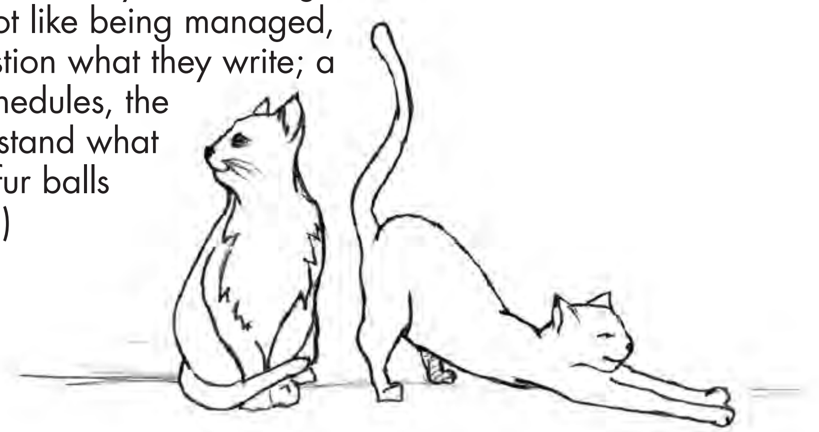
TERM	DEFINITION
Final Management Review	Just before planned final production and delivery, the final sign-off of a proposal by upper management who are looking at the proposal for the first time and use the review to edit and proof the proposal and question the proposed solution and price, tasks that should be done much earlier. (See also book check.)
Fluff	Superfluous proposal content that says nothing about your proposed approach to providing a product/service or the benefit of that approach. (See also proud and pleased.)
Friday, 5:30 p.m.	A favorite time for a prospective customer to release an RFP, causing the proposal team to work over the weekend to begin RFP analysis or start the analysis on Monday with the resulting loss of two work days.
Ghosting	A proposal practice of insulting your competitors or raising concerns about their capabilities without naming the competitors or directly referring to anything they have done or have not done.
GIGO	Garbage In, Garbage Out—as true in proposal development as it is in computer programming.
Gold Team Review	A follow-up proposal review to assess how well the proposal team recovered from a Red team review; allows a group of proposal experts to second-guess Red team recommendations and give conflicting guidance to the proposal team. (See also oh no-itis.)
Good Enough For Government Work	A non-competitive attitude to take when developing a proposal for the Federal government or any type of government, for that matter.
Good News, Bad News-itis	An ailment marked by good news that you won the proposal, and the bad news that you won the proposal and now have to provide what you promised in the proposal.
Grant Proposal	A proposal that entrepreneurs think they can write to win free Federal funds to start their business; also the answer to the question: What business document is buried in Grant's tomb? (with apologies to Groucho Marx).
Graphics	After-thought content in many proposals. (See also eye candy.)

Ghosting

A proposal practice of insulting your competitors or raising concerns about their capabilities without naming the competitors or directly referring to anything they have done or have not done.

Herding Cats

The effort by a proposal/volume manager to get well-written, responsive, and timely proposal sections from busy and writing-challenged engineering SMEs, who do not like being managed, writing proposals, or having anyone question what they write; a situation identified by busted proposal schedules, the claims of engineers that you would understand what they wrote if you were an engineer, and fur balls clogging their keyboards. (See also SME.)



TERM	DEFINITION
Hand Grenade Responsiveness	Producing a proposal responsive to most of the RFP requirements with your fingers crossed that it will be responsive enough to win the contract.
Happy-to-glad Review	A proposal review that focuses on editing issues when it is meant to be a substantive review of the proposal's responsiveness and competitiveness; exemplified by reviewers who change the word "happy" to "glad" and question the placement of commas and the use of capitalization, thinking these efforts are key contributions to the proposal.
Have Proposal Will Travel Consulting	The practice of proposal consultants saving file copies of proposals/volumes/sections they have written for clients and then using them for other clients; a good reason not to hire these consultants if they offer these resources or to fire them when their use of these resources is discovered in your proposal.
Herding Cats	The effort by a proposal/volume manager to get well-written, responsive, and timely proposal sections from busy and writing-challenged engineering SMEs, who do not like being managed, writing proposals, or having anyone question what they write; a situation identified by busted proposal schedules, the claims of engineers that you would understand what they wrote if you were an engineer, and fur balls clogging their keyboards. (See also SME.)
Hit the Street	The release of a hard copy RFP to prospective bidders; similar to the more recent term of "hit the cyberspace" for the posting of an RFP on the Internet for download.
Horse Caption	A lazy caption that provides little insight about the content of a graphic; examples such as Organization Chart, System Schematic, and Flow Diagram; although a lazy practice, not as lazy as providing graphics with no captions whatsoever.
Incumbent-itis	An ailment marked by incumbents letting their over-confidence in a re-compete procurement lead them to put less effort in their proposal than they should.
Intro Typo-itis	An ailment marked by the appearance of a typo, grammatical error, or misspelled word within the first two pages of a proposal introduction/summary (or executive summary) no matter how many times the section is reviewed, proofed, and spell-checked.
It's	The possessive form of it; usage indicating that it's user may have dozed through too many English classes in high school.
Journalists	Good candidates for filling a proposal writer job; likely to have skills needed for proposal writing, including the ability—under deadline—to work with others, collect information, and write about subjects that they know little about; may already be used to getting low pay and working weekends. (See also paperback writer.)
Just In Time-itis	An ailment marked by completing a proposal development task at the last possible minute. (See also clutched hand-itis and chasing the FedEx truck-itis.)
Kick-off Meeting	A meeting to discuss proposal planning, including proposal work assignments; often attended by those who will never attend another proposal meeting or do any real proposal work. (See also B&P work order.)

Lazy List-itis

An ailment marked by the overuse of bulleted and cryptic listings with symptoms including:

- the lack of meaningful data
- wasted white space on the page
- a proposal that looks like an outline.

TERM	DEFINITION
L&M Disconnect	The practice of the proposal instructions in a Federal Government RFP asking for proposal content that will not be evaluated, or the RFP's evaluation criteria indicating the evaluation of proposal content that is not required by the proposal instructions.
Lack of Detail-itis	An ailment marked by proposal writer reluctance to describe the who, what, when, where, how, and why of the proposed approach; caused by a writer not knowing the information, or claiming that the prospective customer does not need/want the information or already knows it, or if the information is provided it could over-commit the bidder.
Last Proposal-itis	An ailment marked by the plaintive cries of weary and frazzled proposal professionals who say "This is the last proposal I ever work on!" and then work on another one; a similar ailment suffered by women who say "no more children" during labor or runners who say "no more marathons" during the last six miles of a marathon, yet, have another child or run another marathon.
Lazy List-itis	An ailment marked by the overuse of bulleted and cryptic listings with symptoms including: the lack of meaningful data, wasted white space on the page, a proposal that looks like an outline.
Low-Ball Price	An artificially low price in a proposal to underbid the competition and win a contract; an excuse to explain why you lost to the winning contractor, ignoring that you submitted a high-priced and non-responsive proposal.
Multi-Award Contract Procurement	A procurement process that allows you to win a contract without submitting the best proposal.
Must Win	A contract that must be won, in contrast to a contract that is not so important to win; a declaration made to push the proposal team to give its best on the proposal, in contrast to not-so-important proposals that do not require a proposal team's best; can be designated as such by marketing/sales reps not for the sake of contributing to the company's bottom line but for the bottom line of meeting their sales quotas.
No Time to Plan-itis	An ailment marked by a late start on a proposal and the proposal team stating that there is no time for proposal strategizing, planning, and outlining because "we need to start writing."
Not Invented Here-itis	An ailment marked by resistance to make changes in the use of proposal processes, strategies, or tools because "we have never done it that way" or "we did not do it that way on the ___ proposal, and we won it."
Numerous	A proposal term used to quantify something when you are not sure of the exact number. (See also extensive.)

Ostrich-itis

An ailment marked by ignoring the weaknesses of your proposal's technical or management approach or the cited past performance contracts with the hope that the prospective customer will not know about those weaknesses.

TERM	DEFINITION
Offeror	A fancy Government RFP term for a bidder; a word that does not pass spell-check.
Oh No-itis	An ailment marked by the "Oh no, you did exactly what you were told you to do" attitude of a follow-up review team that contradicts the guidance it (or another review team) gave the proposal team in a prior review.
Oral Presentation	An oral presentation, ah, typically given after the submittal, ah, of the written proposal, ah, in support of the, ah, procurement process; ah, can be almost as important, ah, as the proposal, ah, in the, ah, selection process.
Org Chart-itis	An ailment marked by the wrong assumption that a management approach is clearly explained by an organization chart.
Ostrich-itis	An ailment marked by ignoring the weaknesses of your proposal's technical or management approach or the cited past performance contracts with the hope that the prospective customer will not know about those weaknesses.
Out the Door-itis	An ailment marked by the harried and mistake-prone work at the end of a proposal process because writing, review, and edit of the proposal are allowed to infringe on the time scheduled for printing, binding, book checking, and packaging the proposal for delivery.
Out of the Blue Graphics	Graphics that appear with no captions or text referrals, leaving the proposal evaluators to figure out the meaning and purpose of the graphics on their own.
Over Expectation-itis	An ailment marked by expectations of proposal/volume managers that proposal writers should write sections that are readable, accurate, and responsive to the RFP, and that they actually understand what they write; disappointment caused by writers who use proposal boilerplate they do not understand or know to be accurate, while refusing to tailor it for responding to the subject RFP. (See also boilerplate and writer discretion-itis.)
Over the Wall-itis	An ailment marked by marketing/sales reps passing an RFP to the proposal team with an order to have the proposal ready by a certain date but with no plan on their part to contribute anything to the proposal.
Page-limited Proposal	An RFP requirement limiting a proposal or part thereof to a maximum number of pages; used to minimize the pages that must be read by proposal evaluators and thereby reduce their evaluation workload.
Paid by the Word-itis	An ailment marked by verbose proposal writers writing like they get paid by the word; if left untreated can become a more virulent strain called paid by the syllable-itis.

Parrot-itis

An ailment marked by repeating RFP requirements in the proposal with the basic statement you will meet the requirements (the what) without explaining the who, when, where, why, and how of your solution; not to be confused with the illness of a Jimmy Buffett fan. (See also trust me proposal.)

TERM	DEFINITION
Paperback Writer	A possible candidate for filling a proposal writer job; if hired may have to change writing style from entertaining to selling because entertainment is not typically a proposal goal; a song by the Beatles. (See also journalists.)
Parrot-itis	An ailment marked by repeating RFP requirements in the proposal with the basic statement you will meet the requirements (the what) without explaining the who, when, where, why, and how of your solution; not to be confused with the illness of a Jimmy Buffett fan. (See also trust me proposal.)
Past Performance	Proposal descriptions of contracts performed in the past that are supposed to (1) show relevance to the proposed contract and (2) demonstrate the bidder's ability to perform the proposed contract; too often consisting of untailored boilerplate of outdated contract write-ups that do neither.
Pink Team Review	A team to review proposal outlines or first drafts before the Red team review, which can then contradict the Pink team guidance and re-direct the proposal team; can be supported by massive supply of the three basic proposal food groups for the reviewers.
Pizza	One of the three basic food groups for a proposal development/review team diet. (See also coffee and donuts.)
Pleased	One of the first words that often appears in a proposal executive summary, introduction/summary, or transmittal letter: as in "we are pleased to submit this proposal" ignoring that the prospective customer likely does not care if you are pleased. (See also fluff.)
Post-mortem Evaluation	A post-award evaluation done internally to determine why you won or lost a proposal; for winning proposals—leads to the same recognition to all who contributed to the proposal regardless of how much work they did; for losing proposals—leads to excuses that you lost because the winner submitted a low-ball price (despite you proposing a better product/service) or the RFP was wired in the winner's favor.
Program/Project Manager	A person named in the proposal to lead the program/project if the contract is awarded; selection based on choosing the person with best resume or best name recognition with the prospective customer regardless of whether the person will be available to contribute anything to the proposal or serve in the program/project. (See also bait and switch-itis.)
Proposal Directive	A standard operating procedure document that contains guidelines for proposal management and development tasks and style standards for the proposal document (text, graphics, and layout); often ignored or seen as an inconvenience or suggestion with any similarity between its guidelines and what is really done only a coincidence. (See also style guide.)
Proposal Evaluators	The unfortunate souls assigned to evaluate proposals in a competitive procurement; can have as much desire and motivation to read the proposals as many of the proposal writers who were assigned to write those proposals.
Proposal from Hell	Difficult proposals that lead to stress, tummy aches, migraines, loss of weekends, 14-hour work days, loss of sleep, broken marriages, and over indulgence in the three basic proposal food groups and alcohol, a beverage consumed only when away from work, something that does not occur much with this type of proposal.
Proposal Instructions	RFP instructions to follow for developing the proposal outline and content as long they do not conflict with what you think should be in the proposal.
Proposal Manager	The person with the responsibility—but little or no authority—to produce a competitive and responsive proposal.

Q&A

Questions and Answers—questions about the RFP submitted by prospective bidders with responses from the prospective customer stating that the answers to the questions are in the RFP.

TERM	DEFINITION
Proposal Preparation Schedule	A schedule for producing the proposal; often ignored or seen as an inconvenience or a suggestion with any similarity between its milestones and what is actually done only a coincidence.
Proposal Process	A process set as the standard operating procedure for a proposal organization; often ignored or seen as an inconvenience or suggestion with any similarity between its procedures and what is actually done only a coincidence.
Proposal Template	A mythical software program that automatically produces proposals with little work on your part by outlining and populating itself with boilerplate content and your fill-in-the-blank inputs for any prospective customer and any product/service; sought by those who believe in unicorns, Bigfoot, and snipe hunts, and who think the Chicago Cubs will win another World Series.
Proposalese	Legal-bureaucratic or bombastic wording in proposals by those who write like lawyers or informationmercial producers.
Proprietary Data	Proposal data tagged as proprietary so it will be safeguarded and only used by the prospective customer to evaluate that proposal; often includes data that really is not proprietary because it is a lot easier to designate everything proprietary in a proposal.
Protest	A process available to losing contractors allowing them to appeal Federal Government award of contracts to other contractors based on grounds that the Federal Government did not comply with its procurement guidelines/regulations; typically a futile effort. Eeven if it succeeds and you force a re-compete or actually win the award, you run the risk of really irritating the folks you want to work for.
Proud	One of the first words that often appears in a proposal executive summary, introduction/summary, or transmittal letter: as in “we are proud of our product/service and or our xx years of service”—ignoring that the prospective customer likely does not care if you are proud. (See also fluff.)
Q&A	Questions and Answers—questions about the RFP submitted by prospective bidders with responses from the prospective customer stating that the answers to the questions are in the RFP.
Quality	A common buzz word used in proposals because prospective customers like quality products and services; often used with little substantiation or explanation of the quality of the proposed product/service.
Recovery Plan	A plan to re-work a proposal based on a blistering proposal review; particularly hard to implement when there are three days left before the proposal delivery deadline.
Red Team Review	A formal proposal review named because of the red pens used to mark up proposal drafts and/or the blood letting that can occur from particularly biting criticism by the review team; can be supported by massive supply of the three basic proposal food groups for the reviewers.
Responsive	An adjective you want associated with your proposal; opposite to non-responsive, an adjective you do not want associated with your proposal. (See also compliant.)

Sick of Looking at it-itis

An ailment marked by the realization if you have to read or revise another draft of the proposal you are going to scream; a good indication that the proposal is ready for final production—or should be.

TERM	DEFINITION
Resume	A proposal resume of key personnel that is supposed to (1) show that their experience is relevant to the work they will perform for the proposed contract and (2) demonstrate that they have qualifications to perform their job for the proposed contract; too often untailored boilerplate of out-dated resumes that do neither.
Review Debrief	An oral debrief by a proposal review team provided to the proposal team summarizing the review findings/recommendations; often gets side-tracked by the proposal team defending itself by debating said finding/recommendations.
RFI	Request for Information—a document released by prospective customers to get industry help for figuring out what they should ask for in the RFP that will follow.
RFP	A solicitation document that can be poorly written, incomplete, inaccurate, vague, ambiguous, contradictory, and disorganized with lots of misspellings, typos, and boilerplate, and written by people who would rather be doing something else; a document just like the proposals that can be written in response to said document.
RFP Amendment	An RFP revision released by prospective customers, giving them the chance to (1) correct a poorly written, incomplete, vague, ambiguous, contradictory, and disorganized solicitation that has lots of misspellings, typos, and boilerplate, (2) change RFP requirements, or (3) amplify/correct a prior amendment; for the sadistic amusement of the prospective customers can be released within a week of the proposal due date.
Risk Management Plan	An over-optimistic risk assessment and mitigation plan in a proposal that shows your approach eliminates all technical, management, schedule, and cost risk, while ignoring that there is nothing in life that you can do without some risk.
Shotgun-itis	An ailment marked by bidding on any RFP that asks for products/services that can be provided by your company, regardless of your likelihood of winning the bid; based on the belief that doing proposals is what the proposal department is paid to do, and if you keep bidding, sooner or later you are bound to win. (See also bid decision.)
Show-the-flag Proposal	With no chance of winning, a proposal submitted based on your desire to show the prospective customers that you care about their needs and want to be considered as a team player for future contracts; ignores that a non-competitive proposal may lead prospective customers seeing you as an incompetent team player.
Sick of Looking at it-itis	An ailment marked by the realization if you have to read or revise another draft of the proposal you are going to scream; a good indication that the proposal is ready for final production—or should be.
Signature-itis	An ailment marked by submitting a proposal missing at least one key signature because of the failure to review signature requirements in the RFP; related to an ailment caused by realizing on the day of proposal printing that the person who needs to sign the proposal is out-of-town: forgery-itis.
SME	Subject Matter Expert—an individual who has knowledge that is needed for proposal content; the transfer of knowledge that can be blocked by weak SME writing skills and/or the lack of SME availability or desire to support the proposal. (See also herding cats.)
So What?	A standard that questions the relevance/purpose/benefit of proposal features or content; a question that often has no discernable answer.

TBD

TERM	DEFINITION
SOW	Statement of Work—an RFP section that describes the specifications of the product/service wanted by the prospective customers; can show that they do not really know what they want or have set unrealistic expectations of what they can get; also, a female pig.
Spell Check	A word processing function that is inexplicably used too little by too many proposal writers, and if used without quality editing can lead to sentences like "Wee no what hour customers knead and have never mist a delivery do date in ate years of first-glass surface."
Stand-up Meeting	A daily proposal status meeting, often held in the morning, to keep pressure on the proposal team to make progress and report said progress (or lack thereof) at the meeting.
Step in the Ant Bed-itis	An ailment marked by the release of an RFP and the frenzied effort of a proposal team that starts responding to the RFP with no planning, organization, or control.
Storyboard	A tool used by proposal writers to help plan the content of their proposal sections before they start writing; a distasteful assignment to many writers because they do not know how to develop a storyboard, and see it as something they have got to do to get the proposal/volume manager off their backs; a tool that once produced and approved can have little or no impact on what is actually written.
Style Guide	A document with style standards for developing proposal text, graphics, headings, and layout; often ignored or seen as an inconvenience or suggestion with any similarity between it and what is actually done only a coincidence. (See also proposal directive.)
Subcontractor	A company providing the prime contractor with a product or service that the prime cannot or does not want to provide to a prospective customer; as a member of a proposal team can complicate the proposal development process because its motivation and availability for proposal work do not always match that of the prime; "long pole in the tent" for the prime's development of the price proposal.
TBD	To Be Determined—a placeholder designation reflecting you do not have an answer for an important proposal issue, such as proposal writer assignments, key personnel proposed for the contract, due dates for proposal inputs, or missing information in a proposal draft for a Red team review.
Theme	One of the most important—and challenging—elements in the development of a winning proposal strategy; the challenge being (1) having people agree on the definition of a theme, (2) developing proposal themes when a definition is agreed to, and, if themes are identified (3) effectively using and supporting them in the proposal.
Time Expansion	The wrong belief that a day late in the proposal preparation process contains more hours than a day early in the process, meaning that you can make up for your procrastination by doing unfinished tasks during the last week before the proposal is due. (See also eight days a week.)
Today	When the proposal/volume manager wants a section draft from a proposal writer. (See also yesterday).
Tomorrow	When a proposal writer wants to provide a section draft to a proposal/volume manager.
Top-down Pricing	A proposal strategy for pricing based on the price you think the prospective customer wants or has budget for, and not what you think it should be.
Transmittal Letter	A letter accompanying the proposal often containing the words "pleased" and "proud."
Trust Me Proposal	A proposal that lacks detail about who, what, when, where, why, and how of your solution; indicating that the prospective customer should trust you to work out these details when you get the contract. (See also parrot-itis.)

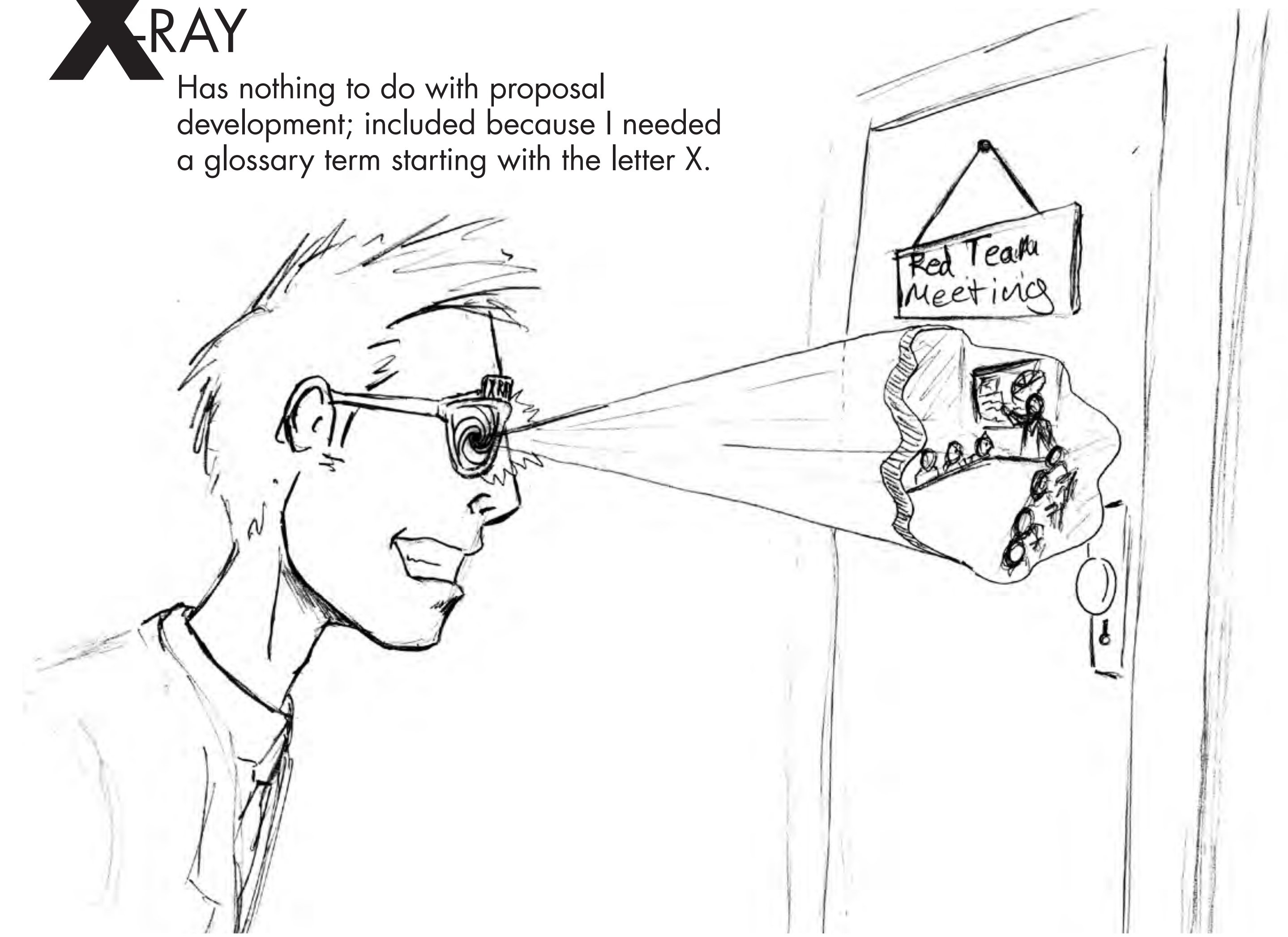
Vending Machine

A proposal department cafeteria.

TERM	DEFINITION
Unsolicited Proposal	A proposal that attempts to sell a product/service to avoid the trouble of trying to sell the product/service in a solicited and competitive procurement process.
Utilize	A three-syllable word utilized instead of the one-syllable word "use" because its utilization seems more technical and business-like; a favorite word utilized by writers who get paid by the syllable. (See also it's.)
Value	A description of how a feature of your product/service will provide value to the prospective customer—a link often missing in a proposal. (See also benefit.)
Vending Machine	A proposal department cafeteria.
War Room	A dedicated room to perform proposal strategizing, reviews, meetings, and writing; can have a lock allowing proposal managers to sequester/isolate proposal development and review teams; to sustain (and appease) the proposal teams, can have a table stocked with catered food and beverages, with leftovers buzzed by fruit flies or eaten by non-proposal employees who happen to wander in the room when it is unlocked.
We are Great Proposal	A proposal that belabors how well the bidder has done in the past with little information about what it is actually proposing to do and the benefit to the prospective customer for doing so.
Weasel Wording	The art of writing a proposal response that does not provide the information requested by the RFP, but gives the impression that it does.
Win Probability	Supposedly an objective evaluation of a proposal's probability of winning a contract that is likely a wishful and subjective guess; if offered by a marketing/sales rep, a percentage that should be reduced at least 50% to be accurate.
Win Rate	A metric used to judge the success rate of proposals (given as a % = number of winning proposals divided by the number of proposals submitted) produced by companies and/or supported by proposal management companies and consultants; assuming the rate is accurate—and that can be open to debate—a metric that may not truly reflect the quality of the winning proposals or the process, people, or tools used to produce them.
Win Strategy	The strategy for producing a winning proposal; the absence of which can lead to a strategy for producing a losing proposal.
Wired RFP	An RFP written by a prospective customer to favor the selection of a particular contractor; great if you are the "wired" contractor, and not so great if you are not; an excuse to explain why your competitor was awarded the contract, as in "We did not have a chance; the RFP was wired for the winner."

X-RAY

Has nothing to do with proposal development; included because I needed a glossary term starting with the letter X.



TERM	DEFINITION
Writer Discretion-itis	An ailment marked by the refusal of proposal writers to accept proposal/volume manager suggestions for planning proposal section outlines and content, a difference of opinion not based on the merits of those suggestions or their compliance with RFP requirements, but rather their incompatibility with the writers' desire to use boilerplate and exert only the minimum effort to write the sections and get the proposal/volume manager off their backs.
Writer's Block-itis	An ailment marked by the inability to write proposal text caused by a mental/physical breakdown between the writer's brain and fingers; can be a devastating malady when facing an approaching proposal submittal deadline.
X-ray	Has nothing to do with proposal development; included because I needed a glossary term starting with the letter X.
Yesterday	What proposal/volume managers would like to say when someone asks when they want the input of a proposal section draft; a song by the Beatles. (See also today.)
Zero	A grade you do not want from the Pink or Red team or the prospective customer's proposal evaluation team.

Author Bio

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Understanding How Evaluators Score *and* How to Influence Their Votes

By Jay Herther, PPF.APMP

What happens after your competitive proposal is submitted to a formal source selection process? How is it evaluated? Understanding the process and human nature dynamics of the evaluators will increase your probability of win.

EVALUATOR

Evaluators View

This article delves into the source selection evaluators and how to influence their scoring and get their votes. It is organized into three sections: Evaluators View; Ethos, Pathos, Logos (and FUD); and the Five Syndromes.

I am describing a complex proposal process where there is a response to a formal Request for Proposal (RFP), Request for Solution (RFS), Request for Quotation (RFQ), or ITT (Invitation To Tender) that is scored by many different evaluators. This is typical of federal and some large state/city procurements. The goals of the proposal evaluation (vendor selection) process are basically three-fold:

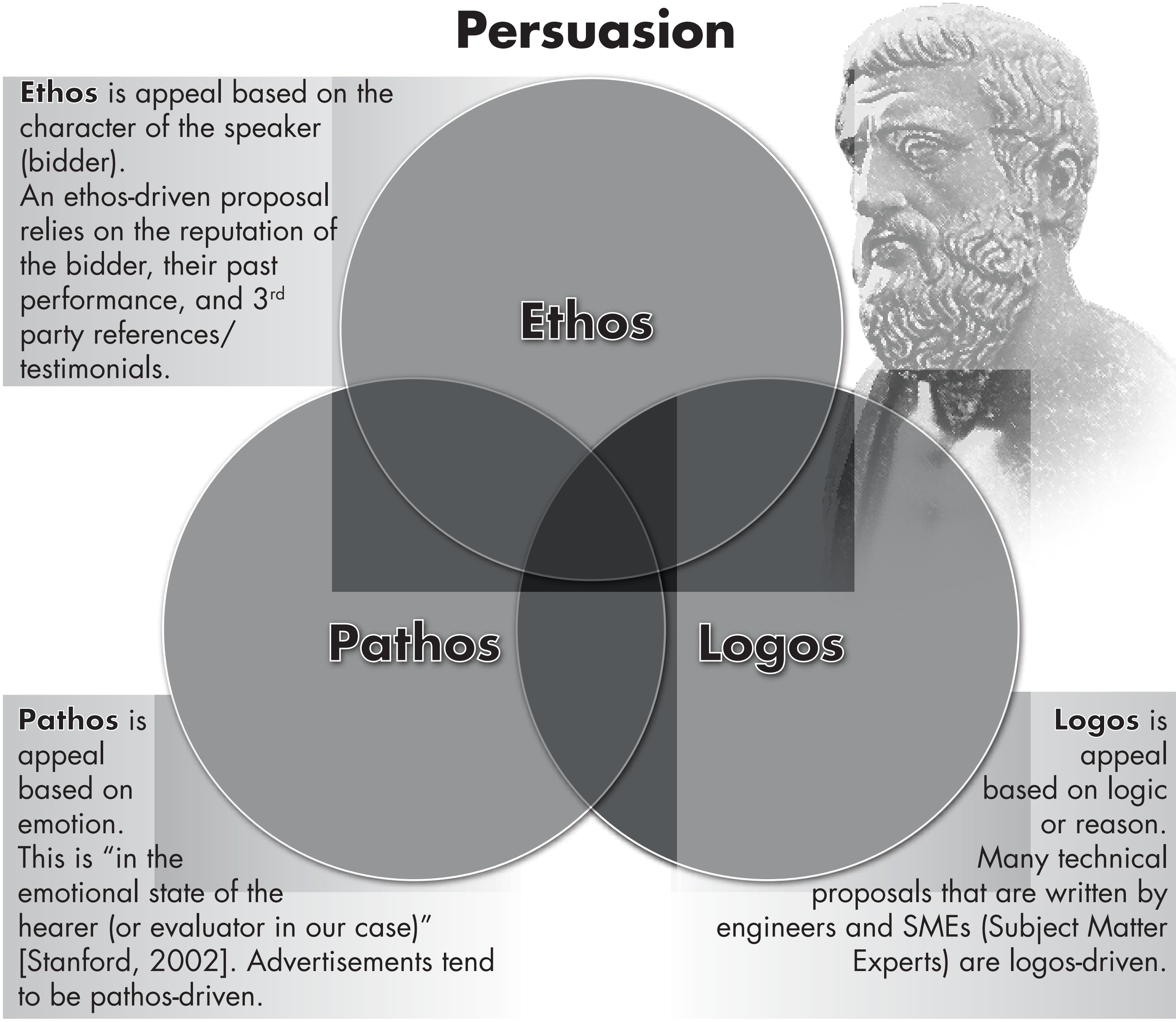
1. To be fair and objective
2. To select the best vendor and often the best value
3. To withstand independent audits and protest [Mikulski, 1993].

A fair and near bulletproof evaluation process is important to attempt to avoid protests that lead to delays. "Bid protests have reached a 10-year high. Federal contractors filed more bid protests at the Government Accountability Office (GAO) during Fiscal Year (FY) 2008 than they did any other year in more than a decade. While displeased contractors are challenging agency decisions more often, their complaints are increasingly falling on deaf ears. Of the 291 cases upon which GAO ruled during FY 2008, only 60, or 20.6 percent, were sustained. Despite the low chance of success through a GAO protest, companies probably are not engaging in 'go-fish exploratory protests'," one commentator said."Larger companies, at least, are concerned about their customer relations," he said. "They do not want to get a reputation for protesting every award" [Brodsky, 2009].

In proposals, the best "A" solution does not always win. Often a great presentation of a "B" solution can beat a good presentation of a great solution.

To achieve the great presentation of Technical, Management, Past Performance, Phase-in, Staffing, and Cost, you have to know the make up of the Source Selection Committee and understand their pain (what keeps them up at night), hot buttons, and personal wins. The evaluators are often pulled out of their line duty (or worse yet, have to continue doing their day jobs) and can be sequestered for weeks or months away from home in an isolated facility or mediocre hotel. It is not easy, and it is tiring. One thing to remember is that evaluators are people and that human nature enters into the equation. There is a proposal joke that Source Selection evaluators are not very smart because if they were they would have gotten out of being an evaluator! It is a difficult assignment, and you can help

*Per GAO report 2008 – **Protests have increased**



by making their job easier. One way evaluators look to reduce their workload is to eliminate a number of non-viable proposals early on. Your goal is not to say or do anything that would have your proposal eliminated.

Often you do not know the evaluators (aka voters), so here is some general advice to appeal to these voters based on a DoD/NASA study called The Evaluator Preference Survey [Dan Safford]:

- Evaluators love summaries
- Evaluators like compliance cross-reference matrices
- Evaluators like a well-organized and consistent proposal
- Evaluators find backup material valuable and useful.

Here is what evaluators found most irritating (in decreasing order of importance):

1. Proposals that are too wordy
2. Poor proposal quality
3. Poor response to RFP requirements
4. Poor approach to resolving the problem
5. Inherent deficiencies, missed requirements, inaccuracy of data.

According to Jon Williams of Strategic Proposals, a proposal consulting company, a buyer's perspective really helps frame the issue. At a recent conference he recorded some insights during a keynote presentation, "Taking Proposals to the Next Level":

- "We have a fear and distrust of people who sell us things.
- I hate people who shuffle the answers and whose proposals don't reflect the structure of the RFP.
- Don't tell me it can't go wrong. Tell me what you'll do if it does.
- Don't hold anything back" from your proposal to your presentation. "There's no such thing as a nice surprise in a bid presentation.
- It all comes down to confidence" in the bidders and their teams.
- Many buyers are frightened – I dare not risk a legal challenge." [theproposalguys.com, 2009].

Ethos, Pathos, Logos (and FUD)

Proposals that score well usually include a combination of Greek philosopher Aristotle's three main forms of rhetoric—Ethos, Pathos, and Logos. To be a more effective proposal writer, you must understand these three terms and how you can apply them to persuasive writing. "Only three technical means of persuasion are possible; technical means of persuasion are either (a) in the character of the speaker, or (b) in the emotional state of the hearer, or (c) in the argument (logos) itself" [Stanford, 2002].

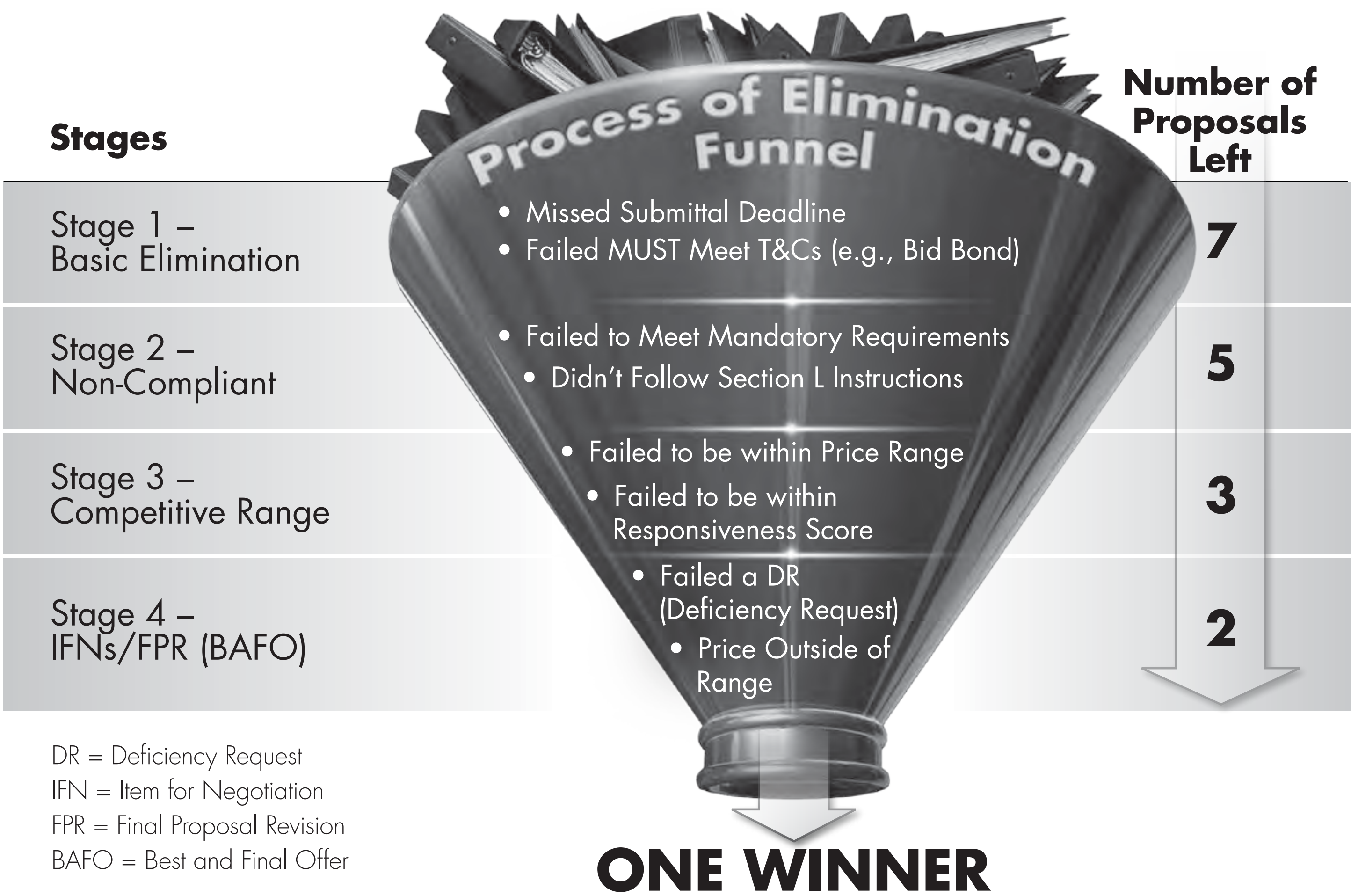
Ethos is appeal based on the character of the speaker (bidder). An ethos-driven proposal relies on the reputation of the bidder, their past performance, and third-party references/testimonials. People vote for and do business with those who they like and trust. Trust increases with customer rapport and contractor credibility and decreases if the customer is put at risk of meeting their objective. "People buy from people… and people buy emotionally" [Frey, 2007]. In this case, we are talking about the emotions and feelings of the evaluators. According to Dick Close, "Evaluation isn't selection. The process is for selecting the source – not the system" [Close, 2008]. Over the years, customers selected IBM as the emotional safe and trusted choice because of the unwritten motto: "No one ever got fired for selecting IBM."

Pathos is appeal based on emotion. This is "in the emotional state of the hearer (or evaluator in our case)" [Stanford, 2002]. Advertisements tend to be pathos-driven.

Logos is appeal based on logic or reason. Many technical proposals that are written by engineers and Subject Matter Experts (SMEs) are logos-driven.

Interestingly, if voters used only Logos and facts, it would be simple to vote for the best proposal. If that is all there were to it, a computerized program would be sufficient to make the decision. However, it is often believed that people make decisions based on emotion (ethos) then seek out supporting data (logos) to rationalize their decision. "In addition to logics, you must focus on psychologics. Evaluators want a relationship based on trust, founded on rapport, and characterized by understanding and assurance. They look to have comfort in you and your proposal team. They seek credibility which is made up of three things: competence, expertise, and trustworthiness in your audience's mind" [Freed, 1995]. The basic theme is first you must have Ethos (you are credible); then Pathos (you understand me/my problem); and, if you passed those two tests, then and only then you could present your Logos (thoughts, idea, opinion).

The Six Thinking Hats by Edward De Bono have some parallels to these terms. For example, "Red Hat" thinking corresponds to pathos and includes emotional thinking. Red Hat arguments are based



on feelings, emotions, and intuition. The "White Hat" equates to logos in that it is fact-based and relies on a computer-type response of facts and figures [De Bono, 1985].

FUD—Fear, Uncertainty, and Doubt

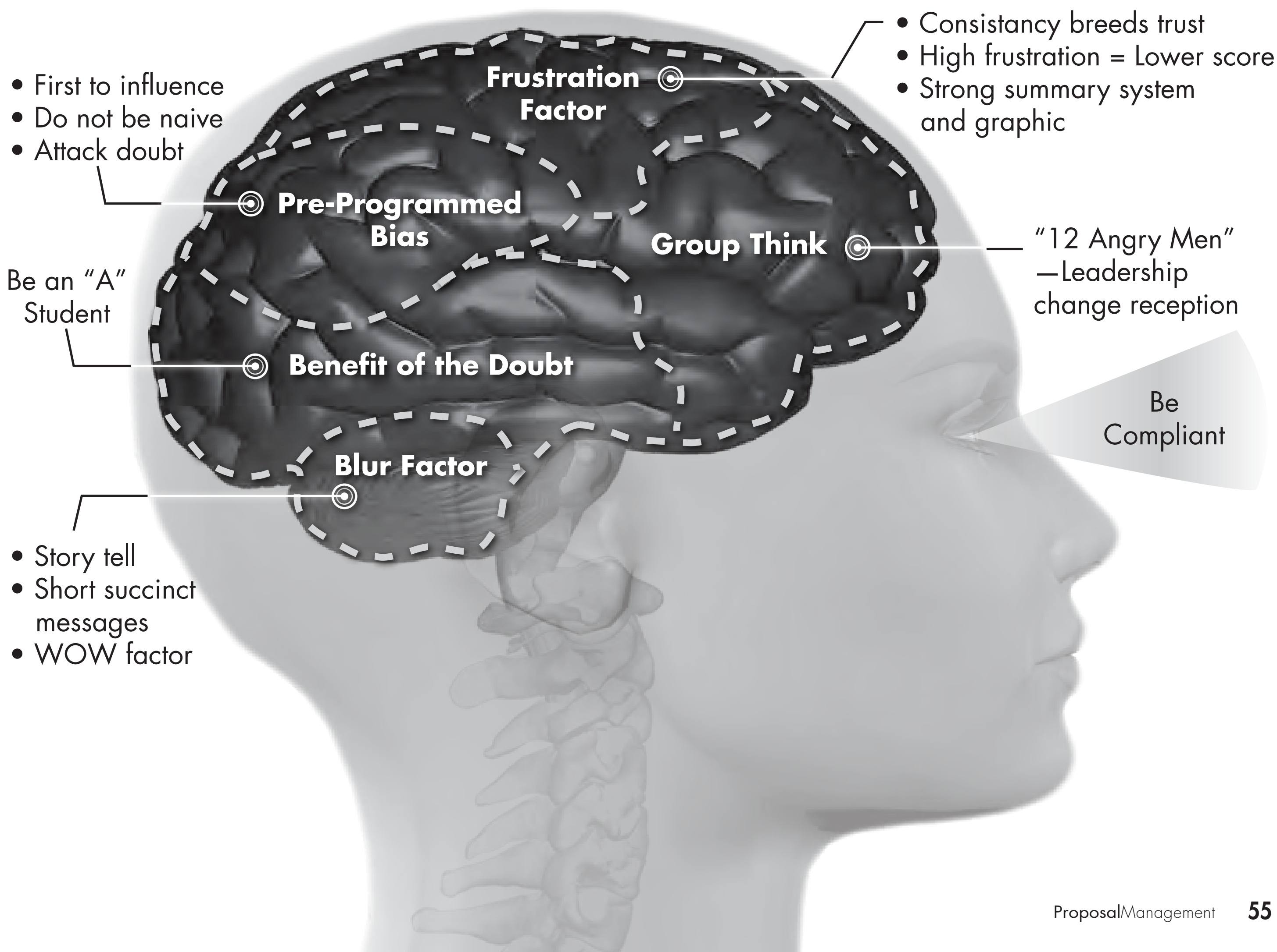
"The emotional aspects of all competitions are extremely important; indeed they are probably overriding. Exploit your customer's hopes, fears and biases. You appeal to his little boy hopes, play on his fears, and address his biases in order to show why he should select you rather than a competitor. When we talk about costs, we touch strong emotions. Risks bring out strong fears as well as biases" [Beveridge/Velton, 1982]. Planting seeds of FUD is a way to address the customer's hopes and fears and present a "ghost" to diminish your competition.

For example, if the last vendor (perhaps the incumbent) had some serious cost overruns, you can bet that your customer was in his or her boss's office trying to explain the reasons and pleading for a larger budget. Appeal to this fear by highlighting your past performance of never exceeding a cost-plus budget and show the data (this is "ghosting" in a proposal). Buyers and evaluators are also fearful of failure, a program that is cancelled, or a poster child for poor performance. This fear directly impacts the buyer's career and reputation. So, hit this emotional lightening rod and make sure that they can sleep well at night if they select you.

In a proposal voting process, the proposals are scored, and the Source Selection Evaluation Board (SSEB) brings their recommended decision to the Source Selection Advisory Committee or final Source Selection Authority. The scoring typically highlights major and minor strengths, weaknesses, and risks. The evaluator's emotions play a role and bias the scoring. In the battle of the "intellectual" versus the "emotional" platform, the latter almost always wins. So, the way to win the battle is to make the evaluator feel they are making the right choice for the right reasons. Evaluators will ask themselves: "Will I have a 'personal win' ensuring that my agency/company and I will be better off in the future with this vendor?"

Five Syndromes

First, the evaluator's job is difficult, tiresome, and often quite painful. "There is a shortcut that can relieve the burden: quickly identify any proposal that is clearly non-responsive, nonconforming or just extremely poor. Part of the first day could be used for such scanning. If you eliminate one or two proposals (but provide substantiating documented justification) you have more time to review the qual-



Crafting Your Argument

[Williams, 2003]:

"We build arguments out of answers to just five kinds of questions we ask one another every day:

- What are you claiming?
- What reasons do you have for believing that claim?
- What evidence do you base those reasons on?
- What principle makes your reasons relevant to you claims?
- But what about ...?

In conversation, someone asks us those questions, but when we write, we have to imagine those questions on our readers' behalf."

Based on this, a simple formula for putting forth your arguments in a written proposal is:

Claim

because of

Reason

based on

Evidence

ity proposals. The other alternative is to work 12 hour days" [Mikulski, 1993]. "The central idea is to help you eliminate as many non-compliant and incompetent proposals as early as possible, giving you more time to spend on proposals that deserve your attention. The purpose of the first two rounds of evaluations is to eliminate as many proposals as possible" [Porter-Roth, 2002]. Evaluations have multiple stages such as prequalification, and your organization can often be selected because others were eliminated. So the first step in heading toward the winner's circle is to make the shortlist.

"Evaluating a proposal, then, is really a process of elimination, rather than a process of selection. That's why when you write your proposal you ought to be focused not on writing a proposal that will be selected. You should instead focus on WRITING A PROPOSAL THAT CANNOT BE ELIMINATED! You must be aware of this as you write your proposal. You need to write it in such a way that there is no possibility that the evaluator can toss it into the reject pile, not at the beginning of the evaluation nor at any time during the process as the pile of "keepers" grows smaller and smaller" [Safford]. The graphic on page 54 indicates an example of the process of elimination. It shows several stages of how the Source Selection team could potentially reduce seven proposals received down to the winning one. There are five key syndromes that characterize evaluators. Understanding these will help you overcome them and improve your next proposal. Below each syndrome are some tips on how your proposal should address each one.

Benefit of the Doubt.

The cost proposal is a math test with objective answers; cost is the common

denominator. The rest of the proposal is more like an essay exam. The essays are more subjective to grade. In school, the "A" student who turned homework in on-time all semester may get the benefit of the doubt from the teacher grading the final essay exam. Conversely, if a student is branded as a "C" student who does not work hard, he or she will not get this benefit. Often evaluators are skeptical and will not give the bidder the benefit of the doubt. Statements that just parrot back the RFP or imply "trust me" do not work. Evaluators will not just take the bidder's claims as fact. Unsubstantiated claims fail; proof with data works. In baseball, the tie on a close play goes to the runner, not the fielder. In proposals, the call goes to the company positioned to win.

The message is simple–be an "A" student with a positive bias before they grade your proposal.

Group Think.

Ideally, all evaluators are supposed to be independent and secluded in private voting booths; however, in practice, opinion leaders bias people. Like a jury deliberating, people talk to people they respect and listen to endorsements to help them decide how to vote. There are typically a few outliers with strong opinions and those positions are debated until reconciled and a general consensus is reached. "The panel discussion process can have the effect that strong personalities exercise pressure on junior members to alter their score" [Mikulski, 1993]. An interesting film on the dynamics of Group Think and decision-making is 12 Angry Men. The film review by Tim Dirk describes this classic as a "compelling, provocative film examines the 12 men's deep-seated personal prejudices, perceptual biases and weaknesses, indifference, anger, personalities, unreliable judgments, cultural differences, ignorance, and fears that threaten to taint their decision-making abilities, cause them to ignore the real issues in the case, and potentially lead them to a miscarriage of justice."

That is the reason it is important to have a champion who is an opinion leader on the SSEB. Your champion must have been positioned ahead of the evaluation and must defend and bolster your positions.

Pre-Programmed Bias.

Most evaluators have a pre-programmed bias before they even open your proposal binder. Their biases are based on what you have told them, what ghosts that the competition associates with you, and what others have said. Here are three tips to deal with pre-programmed bias:

- First, be the pre-programmer and insert biases into the evaluator's

10 Point Checklist to Reduce Frustration and Improve Your Score

Compliance	Check against the "shall list." Did we answer ALL the RFP requirements? Did we precisely follow Section L—proposal instructions organization? Did we "answer the mail"?
Responsiveness	Are we responsive to the Evaluation criteria (Section M)? Did we address customer hot buttons?
Ethos (emotion)	Did we focus on the evaluator's emotions and implicit needs? Do we support the "Buyers Win"?
Benefits	Did we map the features to benefits?
Show Value-Added	Compare to RFP spec, and if we surpass, state we have 50% growth margin or we are 2-times better than spec. Quantify the claims.
Repeat Key Themes and Messages	For important themes did we tell 'em what we are going to tell 'em, then tell 'em, then tell them what we told them? Did we include succinct soundbites?
Sentence Structure	Short 10-15 word sentences. Use active voice.
Customer Need/Focus	Is your section generic boilerplate or tailored to this proposal, and this customer? Do we mention our company name too many times and not the customer by name? Did we do a data-dump or did we summarize and keep providing more detail as the evaluator reads on?
Consistent	Do numbers match in every section? Do product names and nomenclature match everywhere?
Avoid bravado and chest-puffing that is not substantiated	Common over-used phrases like "World Class," "Best-of-Breed," and "State-of-the-Art," are usually an annoyance. When we make a claim, is it substantiated with proof and data?

Higher Frustration =

mind prior to the RFP release.

- Do not pretend that the bias does not exist. If you think an evaluator perceives a weakness, rather than avoid it, face it and address it head-on. Meaning, "Create the dragon and slay the dragon" in your proposal. Show that you have performed and demonstrated risk reduction through prototypes, demos, bid samples, and tests to overcome this issue. Simply stated, show evidence and proof that you have addressed this bias. "People are most strongly convinced when they suppose that something has been proven" (Rhet. I.1, 1355a5f., Stanford, 2002].
- As the expression goes, "if you can't fix it, feature it." In some cases, the bias is true and you cannot change the evaluator's minds. If you had performance problems on a similar program, describe the lessons learned and the specific elements of your program management and risk reduction plan that address these issues.

Blur Factor

After an evaluator reads two, three, or five proposals, the documents all become a blur. To be sure, each proposal is evaluated stand alone against the evaluation criteria, but human nature indicates that each evaluator is drawing comparisons. Here are three tips to deal with the blur factor:

- Share case studies, anecdotes, metaphors, and stories because storytelling enhances recall.
- Use sound bites like a political campaign ("Yes we can," "Change," and "It's the Economy, Stupid"). People remember short, succinct messages.
- Add some "Wow" factor that is memorable.

Frustration Factor.

A major factor in how your proposal is scored is the evaluators' frustration factors. Evaluators who are frustrated because your proposal is not compliant, concise, and clear can give you a lower score. Evaluators are also frustrated when the proposal is more about what the bidder's engineers wanted to write than what the evaluators asked to read. The best way to experience this is to evaluate a proposal yourself against the Section M evaluation criteria. You will find that you do not really read the proposal, but rather just skim it looking for the answers. You will also discover that you become annoyed and suspicious if answers to the RFP Section L, C, and M items are missing or in the wrong place. You are also a little miffed if the text is confusing or inconsistent, and you have to go back and re-read a page several times. A popular expression applies: "Consistency Breeds Trust." There is a simple formula that relates frustration level to point score:

Higher Frustration = Lower Score. Therefore, reduce evaluator frustration to increase score.

Where frustration is a function of factors that make a proposal easy to evaluate (complaint, clear, consistent, compelling, and customer-focused).

Evaluators can become irate and score low when your SME does a data dump that reads more like an esoteric doctoral thesis. In his best-selling book *Blink*,

Lower Score.

Therefore, reduce evaluator frustration to increase score.

Malcolm Gladwell maintains that we "blink" when we think without thinking. We do that by "thin-slicing," using limited information to come to our conclusion. In what Gladwell contends is an age of information overload, he finds that experts often make better decisions with snap judgments than they do with volumes of analysis [Gladwell, 2005]. This has interesting applications to proposals. Many SMEs suffer from the "Curse of Knowledge," meaning they feel they must share ALL the data/information to convince evaluators of their argument. This is usually not the best form of persuasion. It is far more compelling to have a strong summary statement and a powerful graphic with the conclusions described in the action title. For those who want all the detailed back-up data and analysis, refer them to an Appendix in your proposal. The Blink premise also shows why the cover letter and executive summary are so important to having the evaluators make a snap decision to favor your proposal.

Your proposal must be compliant ("answer all the mail"), concise, and clear. It must be easy to read and easy to evaluate. The 10-point checklist is useful to reduce the frustration level of busy evaluators to get them in the mood to better score sections of your proposal.

Studies of government source selection boards have found that an evaluator normally does not understand 75 percent what he or she reads in the proposal [Allston, 2000]! This means your proposal must improve an evaluator's understanding by having an executive summary, easy-to-read introductions, and avoid complex illustrations [Herndon, 2000].

In Jayme Sokolow's *Journal* article, "How Do Reviewers Really Evaluate Your Proposal?," he delves deeply into the theory of how heuristics influence how evaluators score [Sokolow, 2004]. His summary below highlights specific supporting actions that you can take in your proposal. Many of these are effective in overcoming the five syndromes.

"To encourage reviewers to use simple heuristics, take the following steps:

- Develop a comprehensive proposal compliance matrix.
- Use the principles of information design to organize your proposal.
- Depict quantitative evidence, processes, and cause and effect with clear and compelling visual explanations.
- Promote the use of the recognition heuristic by:
- (1) Structuring the proposal according to the RFP instructions;
- (2) Discussing your points in decreasing order of importance;
- (3) Summarizing your major points and benefits throughout the proposal; and
- (4) Focusing on the needs and mission of the agency or business.
- Promote the use of one-reason decision heuristics by making clear linkages between:
- (1) Benefits and features; and
- (2) Solutions and evaluation criteria. Make them very easy to find and understand.
- Provide plenty of cues throughout the proposal, such as theme statements, differentiated headings, different fonts, bulleted lists, and numbers.

- Convey an upbeat and positive feeling of confidence throughout your proposal.
- Emphasize that your solution entails low risks and high benefits, which is the opposite of your competitors."

People who serve as evaluators of proposals submitted to the Federal Government are people with the same emotions as all of us. Hopefully you better understand the evaluator's difficult job. Put yourself in their shoes, and understand their challenges. This will help you write a proposal that avoids getting them frustrated and uses the techniques of persuasion such as ethos (character/reputation), logos (logic/reason), and pathos (emotion). The result will be a higher probability of winning.

CREEP™ is an acronym that I created to help you remember these tips.

C = Compliant (follows the instructions such as Section L and "answers the mail")

R = Responsive (compelling and meets the hot buttons and customer needs)

E = Easy to Evaluate (this avoids the evaluators frustration factor)

E = Ethos (this is you and your firm's character and reputation)

P = Pathos (this is the emotional component).

I hope this article can be applied to your proposals to help you CREEP into the Winner's Circle!

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

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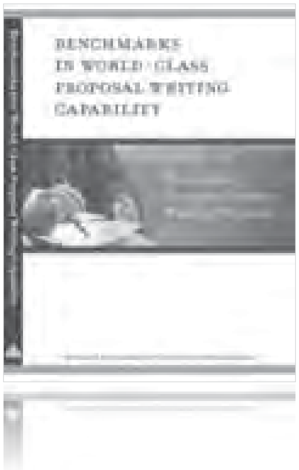


Benchmarks in World-Class Proposal Writing Capability: How Leading Companies Produce Winning Proposals

Business Development Institute International,
November 18, 2008

$224–APMP members
$249–Non-APMP members
$199–Government and Academic Personnel

Sponsored by BAE Systems Electronics and Integrated Solutions, Nashua, NH

by: **Betsy Blakney**, PPF.APMP

Benchmarks in World-Class Proposal Writing Capability clearly lays out the framework for a research project that identifies best practices in proposal writing. This final report documents the methodology and approach the investigators used to select and interview the participants, the issues the investigators had to address before beginning the study, the criteria used for identifying benchmark practices, and the recommended steps to implementing an improvement program, even if only by taking baby steps to affect change and improve position-to-win.

To share the results industry-wide of the 23 companies studied, the findings had to be fact-based and brand agnostic. Using the BD Institute's Capability Maturity Model® for Business Development (BD-CMM) as the framework, the study maintains its independence from technology and process brand and produces unbiased factors for success that organizations of similar maturity can implement. To improve the efficiency and effectiveness of all types of proposal writing activities, the study targeted 182 best practice benchmarks across 5 areas (Figure 1).

While the study initially focused on companies in the Aerospace and Defense industries, the researchers branched out to include the Information Technology and Telecommunications sectors as well.

To see how you measure up against the benchmarked companies in Research Area 1, ask yourself if you or your organization do/have the following in place:

- The Top 10 performers have a process guide that details the policies and processes associated with the organization's business development process, *and they follow it*
- Leading organizations have a proposal planning "framework tool," such as a storyboard, annotated outline, mock-up, or story map, that drives proposal writing efforts
- There is a heavy emphasis on creating graphics through conceptualization first, and those individuals who turn words, ideas, and solutions into graphic elements are part of the proposal team from the beginning of the pursuit
- The Executive Summary always has an overarching graphic that serves as the roadmap for the whole proposal
- To maintain continuity of focus, proposal team members are involved in strategy development up front with the capture team before the final RFP is released

"The Top 10 performers have a process guide that details the policies and processes associated with the organization's business development process, and they follow it."

> *"Some of the predictable results will leave you saying 'I told you so.' Others will present an 'Ah-ha' moment, and leave you to ponder why you did not push for that approach earlier in your career."*

Research Area	**Number of Benchmarks**
Proposal Dev. Steps	51
Use of Proposal Automation	35
Organizational Constructs	24
Training	22
Other Factors	50

Figure 1– Best Practice Benchmarks

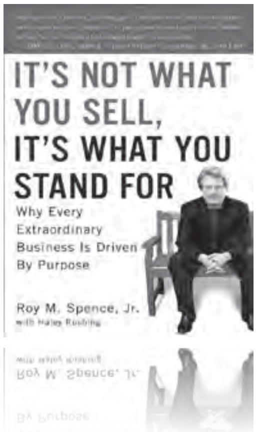
- Most companies used at least five management "gate" reviews, and, of those, the preliminary bid decision was considered the most significant
- Individuals gain maximum benefit from custom tools and templates when they are trained on their use
- Leading companies leverage use of boilerplate material in an actively maintained knowledge management system
- Style guides linked to company brand standards are established early in the proposal writing process, thereby producing better proposals by simplifying production.

For each of the remaining four study areas, you will find many more best practices detailed, such as the collaborative process, using consultants to write/advise on proposals, implementing a training plan, controlling position and perceived value, allocating process resources, using physical vs. virtual facilities, and how to use the results.

Some of the predictable results will leave you saying "I told you so." Others will present an "Ah-ha" moment, and leave you to ponder why you did not push for that approach earlier in your career. This book will also provide you with the ammunition you need to justify process improvement. It provides the necessary guidance to apply the benchmarks in a variety of proposal environments and workplace settings.

Whether you lead the process or are simply a member of the proposal team, this book is the yardstick for enabling winning performance in any organization.

Betsy Blakney, PPF.APMP, has nearly 14 years' experience managing proposals, and she is a Senior Proposal Development Manager for CACI, INC.-FEDERAL. Betsy serves on the APMP Board of Directors as Secretary, is a Conference Co-Chair for the APMP 2010 International Conference & Exhibits in Orlando, FL, and has recently been selected to serve as the Assistant Editor for *the Journal,* after serving as Books Review Editor for two years. She also volunteers as an accreditation mentor for those seeking Practitioner Level status. Betsy can be contacted at betsy.blakney@apmp.org.



It's Not What You Sell, It's What You Stand For:
Why Every Extraordinary Business Is Driven by Purpose

Roy M. Spence Jr. with Haley Rushing

Rushing; Portfolio; February 2009.

$25.95

by: **Amy McGready, Ph.D., AM.APMP**

It's Not What You Sell, It's What You Stand For is a nice, light read. Roy Spence is a Texas-based entrepreneur, one of the founders of GSD&M Idea City in Austin. He built his career helping organizations like Southwest Airlines, BMW, and Wal-Mart become market leaders. Spence argues that market leaders rise to the top not because of what they do or sell, but because they are purpose driven.

Purpose-driven companies, according to Spence, have a set of core values that define their mission in terms of the difference they want to make in the world. A vision of this sort is not a tagline or brand. Rather Spence's vision statement is an internal declaration that focuses an organization on its bigger purpose. This purpose or vision becomes a decision-making heuristic that simplifies choices about product or service offerings and market strategy: all choices must support the core purpose.

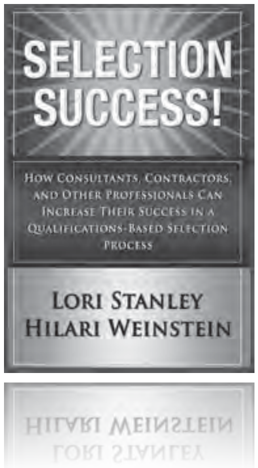
The book is full of anecdotal evidence from Spence's influential clients. One prominently featured client is Southwest Airlines. Spence asserts that the company's purpose revolves around "democratizing the skies." When Herb Kelleher started the airlines in 1971, he believed that 85 percent of people traveling by train, bus, or car wanted to fly but could not afford it. His mission was to make air travel affordable for the non-elite traveler. He focused his energy, money, and business-savvy toward this goal. He decided that serving meals and dressing flight attendants in expensive suits, both market norms of the time, did not serve his purpose and opted for neither. Rather than investing in a diverse fleet, Southwest only flies 737s; this simplifies maintenance and helps contain costs. By vetting all choices against whether they make flying more affordable, Southwest contained costs, distinguished itself from the competition, and became a market leader.

> *"Purpose-driven companies, according to Spence, have a set of core values that define their mission in terms of the difference they want to make in the world."*

A cynical reader may view Spence's anecdotes as a plug for his firm and its ability to create market giants; however, like Jim Collins in *Good to Great*, Spence seems passionate about sharing the lessons he has learned during his career. Much of the book is cheerleading for business professionals. Find your purpose! Love what you do! Do it well! Get rich with purpose! If you can get past the hype, many of the fundamental premises ring true and apply to the proposal world.

As business development professionals, we often become focused on win rates, growth projections, and market share; we lose sight of what our companies stand for and do well. Though it is hard not to love a good win rate, winning alone is not enough to sustain many of us and to justify our profession's long hours and the challenges inherent in motivating a team to produce compelling, fresh proposals year after year. According to Spence, those of us who will be happiest in our profession understand and buy into our companies' purpose, and see our roles as shoring up that purpose rather than simply helping our companies achieve market domination. Spence uses the example of a baggage handler who has to work holidays, and how he explains to his family that by doing his job he's helping other families be together. I wrestle with whether giving up Christmas Eve to work on a proposal really makes the world a better place, but I like the sentiment and the idea that our work serves a greater good than the paychecks we take home or the win rates we post.

Amy McGeady, Ph.D., has been managing, writing, and editing proposals for more than 10 years, and is the President of Propel Consulting. She serves on the APMP Board of Directors and is the Chair of APMP's Central Texas chapter in Austin. Prior to starting her proposal career, Amy earned doctorate and master's degrees in political science from Purdue University and a bachelor's degree in government from the University of Texas at Austin. She can be reached at amy.mcgeady@propelconsulting.net or (512) 454-5979.



Selection Success!

How Consultants, Contractors, and Other Professionals Can Increase Their Success in a Qualifications-Based Selection Process

Lori Stanley and Hilari Weinstein

Mill City Press, Inc.; 2008

$44.95

by: **Ali Paksun, AF.APMP**

I must admit that the title of this book intrigued me. Every task performed during the business acquisition lifecycle is intended to position a bid to achieve "selection success." It is the goal of all capture and proposal team members. There are any number of publications available to mentor on how to achieve a successful bid. I wondered what would be different about this book.

The introduction clarified the purpose of the book: "Although this book is generally written to address consultant and contractor selections for public works projects, this information is also applicable to many private sector selection processes," Stanley and Weinstein advise. "It is created to assist participants in a selection submittal and interview process, whether it is the firm's principal, business development director, marketing coordinator, project manager, of the technical project team. In short, this book will be invaluable to anyone participating in public or private qualifications-based selection (QBS) processes."

> *"Junior members of our profession will find valuable information (inside)"*

Having spent most of my proposal career working on Federal Government procurements, I was especially interested in learning more about the "private qualifications-based selection processes." I found that there is hardly any difference at all between the two. The terminology may be a little different (and the brief glossary of basic terms in the book attested to that), but the meanings are all the same. For example, what the authors refer to as a "panel interview" in the book is analogous to an orals presentation in federal bids.

Indeed most of the information presented will be familiar to most proposal professionals. However, more junior members of our profession will find valuable information; for them, this book could be an excellent addition to their proposal library. Stanley and Weinstein discuss such topics as:

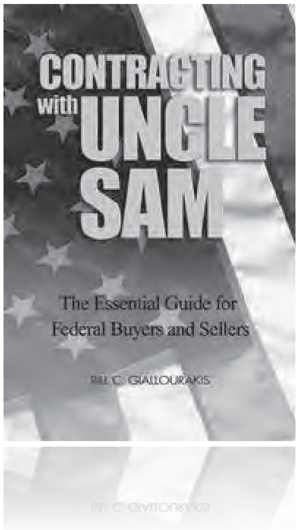
Selecting appropriate staff for your proposal team

- Showing detailed project understanding
- Providing relevant experience
- Developing visuals
- Preparing for a debrief.

The book is well organized into three sections—Section I: Foundations, Section II: Statement of Qualifications, Section III: Interviews, and Section IV: Positioning Your Firm. Each section contains well-written and easy-to-read chapters on topics that relate to the four sections. The chapters that I particularly thought would be helpful to a majority of readers are the ones included in Section III: Interviews. Not all proposal professionals can also claim to be professional orals coaches. While some of the advice is common sense (vary the tone of your voice while presenting), there is also information of how to conduct rehearsals and mock question and answer sessions. A proposal professional in a small company or a Lone Ranger who is thrust into the role of orals coach would be wise to review this section of the book.

Another feature I found helpful was the authors' decision to include a page at the end of each chapter for notes that included a section for the reader to jot down the "key ideas in this chapter" and one used to record "action items." These tools provide an excellent way for the reader to create a plan to implement what he/she learned in each chapter.

Ali Paskun, AF.APMP, has 25 years' proposal development experience and is Senior Proposal Manager for Defense Group Capture at CSC. She is the Managing Editor for the *Journal of the Association of Proposal Management Professionals* and of the APMP *Perspective.* In 2009, she received an APMP Fellows Award. Ali can be contacted at apaskun@comcast.net.



Contracting with Uncle Sam: The Essential Guide for Federal Buyers and Sellers

Bill C. Giallourakis
Naval Institute Press, 2008

$32.95

by: **Betsy Blakney**, PPF.APMP

Written for the beginner, Giallourakis' book covers the acquisition basics and serves as a refresher for contractors and vendors who bid on work funded by the US Government. Foreign and domestic businesses alike of varied sizes will find *Contracting with Uncle Sam* a ready reference that demystifies the Federal Government procurement process.

Giallourakis' extensive litigation experience, military background, and personal accounts through case studies equip you with the knowledge and wisdom needed to bid your first job with a government agency. From his first Department of Defense (DoD) Small Business Innovation Research (SBIR) grant to the development of his first past performance reference, he captivates you with his foray into the federal contracting arena and leads you through the federal procurement process with ease. Gone are the references to Commerce Business Daily (CBD), Standard Industrial Classification (SIC) codes, and the Javits-Wagner-O'Day Program. His market research and acquisition lifecycle terms are up-to-date. He details how the government-wide point of entry, Federal Business Opportunities (FBO), replaced the CBD in 2002 with www.fedbizopps.gov. The 2007 series of North American Industry Classification System (NAICS) codes replaced the 2002 series of SIC codes. Formerly referred to as the Javits-Wagner-O'Day program, the AbilityOne Program rebranded itself. As he states, "Federal funds are not just going to Iraq or to homeland defense against terrorists."

From GSA ADVANTAGE! to e-Buy to the Federal Government's Business Partner Network (BPN), this book identifies online ordering sources and the databases federal contracting officers use to track registered firms (i.e., Central Contractor Registration [CCR]) and retrieve contractors' performance information (i.e., Past Performance Information Retrieval System [PPIRS]). If you are doing business with the Federal Government for the first time, you must apply for a Commercial and Government Entity (CAGE) code and a Data Universal Numbering System (DUNS) number. Along with corporate background data, these items become the elements of your Trading Partner Profile.

Why does this matter? As the author points out, especially for small businesses, the path to becoming a subcontractor to a prime is enhanced by registering in the CCR. In 2004, CCR assumed the Small Business Administrations' (SBA) PRO-Net's capabilities and functions; therefore, small businesses no longer need to register on the SBA PRO-Net site. Furthermore, by law, a small business subcontracting plan must accompany a large business' proposal for a contract in excess of $500 million. The CCR is a valuable resource for prime contractors looking for qualifying small businesses to meet the Government's requirement.

During times of emergency and contingency operations, the acquisition cycle abandons its standardized series of sequential steps and takes a more flexible approach. Depending on the particular situation, a contracting officer can take other courses of action, for instance, to "facilitate the national defense." Here the author describes an innovative contracting approach pioneered by the US Navy, which uses an integrated government contracting team and contrac-

"From solicited proposals to unsolicited proposals, Giallourakis reminds us of our need to know all aspects of government contracting to be successful."

"Giallourakis' extensive litigation experience, military background, and personal accounts through case studies equip you with the knowledge and wisdom needed to bid your first job with a government agency."

tors to concurrently develop a solicitation package for sole source acquisitions. This team approach is used to prepare, evaluate, and award proposals in substantially less time than the traditional approach. Named "alpha contracting," this approach streamlines processes; improves communication, performance, and quality; significantly reduces contractors' proposal preparation costs (since the number of RFP iterations, revisions, and rework are reduced); and results in a program within scope. Its real value comes into play before a crisis occurs. Teams who have planned and worked together in the past perform better in an emergency setting. For more information and sample contracts, go to www.dau.mil (use the "Enterprise Search Engine ACQuire" in the top right panel of the Web page and enter "alpha contracting").

As a proposal manager, I was drawn to the chapters on "Writing a Winning Proposal," (Chapter 4) and "Contracting by Negotiation: Taking the Mystery Out of Best Value Source Selections," (Chapter 6). From solicited proposals to unsolicited proposals, Giallourakis reminds us of our need to know all aspects of government contracting to be successful. He uses a series of questions to help business development professionals make smarter decisions. While he oversimplifies the steps to writing a winning proposal, he understands the effort contractors exert to win business and the risks they take to ensure successful performance. As noted, Chapter 4 concepts apply to federal solicitations and grants, as well as those of state agencies.

If you find yourself scratching your head when word of a best value source selection does not result in a win, then Chapter 6 will alleviate some of your confusion. Giallourakis focuses on two techniques used to determine "best value": the trade-off process and the lowest price technically acceptable process. The remainder of the chapter details contracting negotiations through competitive proposal procedures.

By now, you have learned that this book is more than a restatement of federal regulations and statutes. In a refreshing twist, the author drills home the need for competent project estimating in Chapter 8 "Show Me the Estimate," and argues for protecting a firm's intellectual property or "business jewels" in Chapter 9, while at the same time protecting a contractor's commercial potential for future growth.

Since procurement integrity, ethics, and conflict of interest are such hot topics these days, you will migrate to Chapter 10, "Avoid Being Blacklisted." If the required ethics and compliance training in companies doing business with the Federal Government, such as mine, is not warning enough, the examples described in this chapter alert the reader to the serious nature of violating the Procurement Integrity Act and established standards of conduct. Finally, the last chapter, "The Governance Game," expresses the importance of using sound contract administration practices diligently whether you are the buyer or the seller.

Targeted at procurement officials in many countries, Giallourakis book opens with "Trading Tips," along with a thorough list of abbreviations commonly used in federal contracting, and closes each chapter with "Practicing Business Tips." His sage advice is straightforward and comes from his first-hand experience teaching federal contracting and providing legal counsel on procurement matters. Woven throughout the book are helpful Internet resources and specific guidelines and procedures on how to deal with the Federal Government, such as the differences in contract types, elements of sealed bidding, forums for filing a bid protest, and types of license rights in technical data. Supported by numerous figures, this West Point graduate convinces you that the Federal Government is a good customer, even under bad economic conditions.

Betsy Blakney, PPF.APMP, has nearly 14 years' experience managing proposals, and she is a Senior Proposal Development Manager for CACI, INC.-FEDERAL. Betsy serves on the APMP Board of Directors as Secretary, is a Conference Co-Chair for the APMP 2010 International Conference & Exhibits in Orlando, FL, and has recently been selected to serve as the Assistant Editor for *the Journal*, after serving as Books Review Editor for two years. She also volunteers as an accreditation mentor for those seeking Practitioner Level status. Betsy can be contacted at betsy.blakney@apmp.org.

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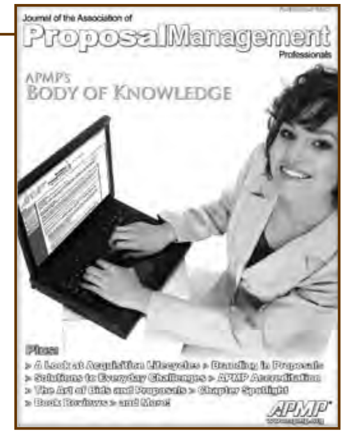

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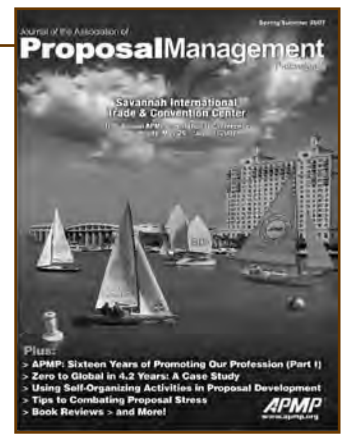

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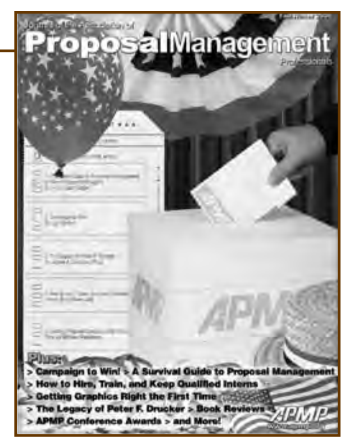

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