Welcome

Ali Paskun, AF.APMP

I have Georgia on my mind! It is only Autumn here in Maryland, and Bid & Proposal Con 2013 is months away. I am already looking forward to it though, and I hope you are, too. Registration is open, so start making plans to attend and take advantage of the opportunity to broaden your knowledge, network with peers from all over the world, and celebrate at the Awards Dinner.

At this year's Bid & Proposal Con, Eric Gregory presented a thought-provoking keynote entitled, "What is a Proposal Professional?" that certainly had everyone talking. It is a question I do not think anyone has asked or addressed before in our community. His assertion that proposal professionals are warriors, that is "…men and women ready, willing, and able to deliver sacrifice for the continued existence of our organizations and for the benefit of all attached to our mercantile or non-profit entities." His keynote defined 10 essential attributes he believes we as proposal warriors must exhibit in our profession. Read his keynote, and join the conversation. What do you think a proposal professional is?

Lisa Wetzel's article asserts that proposal professionals are leaders, and her article "Effective and Ineffective Leadership" asks the question, "what kind of leadership approach do you use as a proposal manager?" She defines various leadership styles she has encountered over her proposal career, evaluates the effectiveness of each style, and offers an assessment of how organizations can encourage the most positive, and effective, leadership qualities.

One of the basic building blocks of a compliant and compelling proposal is a theme that, according to Chris Simmons, "…can make the difference between winning and losing your next bid by providing evaluators with the reasons to pick you." Do you use themes to your advantage in your proposals? Do you craft quality themes that sell your solution? Read Simmons' article to determine if your themes are as effective as possible.

All of us on the *Journal* staff were saddened by the passing of John Elder, Managing Editor of this publication from 2004 to 2008. John had a passion for the *Journal* and for APMP. He was always willing to get involved wherever his help was needed whether it be at the international or local level because he wanted to advance the APMP community. As indicated in the fitting tribute in this issue, John's sense of humor, leadership, and selfless commitment will definitely be missed.

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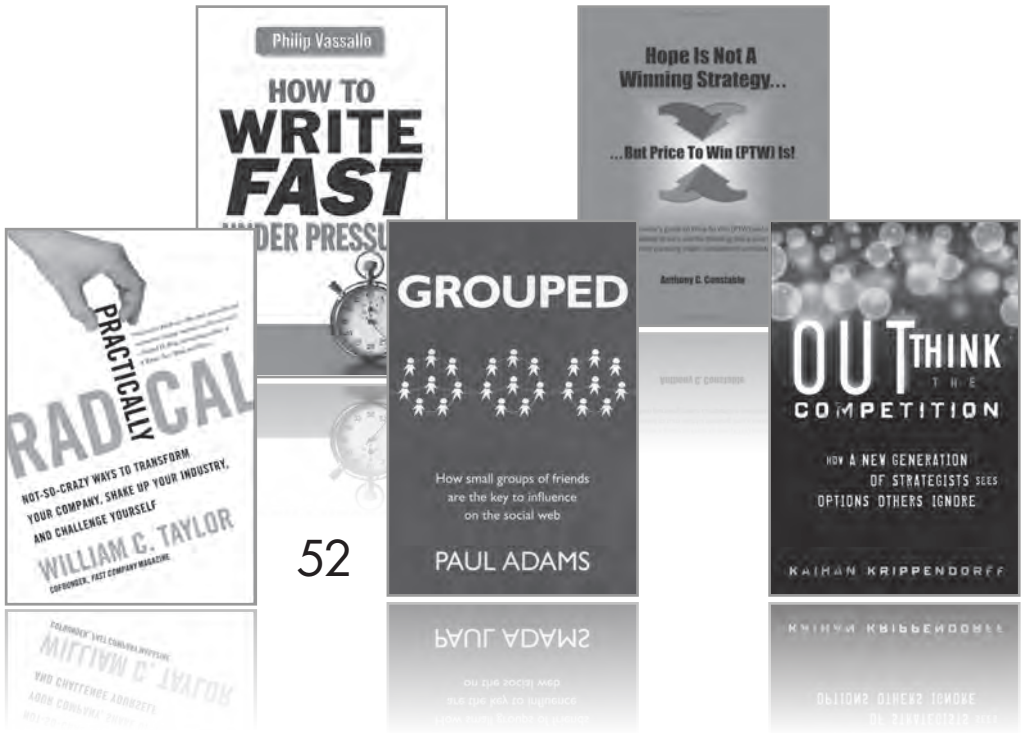

Regulars

General Information

Join APMP's NEW COMMUNITY FOR CAPTURE PROFESSIONALS

The Association of Proposal Management Professionals® (APMP®) has launched **APMP Capture <http://www.apmp.org/?page=APMPCapture>** a new APMP community of individuals and companies dedicated to the process of developing relationships to secure business opportunities.

"Capture is a vital part of the proposal lifecycle and a major activity for many of our members. We think it deserves a major focus at APMP," said Rick Harris, APMP's Executive Director. "We heard the pent up demand for Capture at this year's Bid & Proposal Con and that's why we launched the **APMP Capture** Community. We invite every APMP Capture professional to join this vibrant business community."

APMP Capture is the second community that has been established for a sector of the proposal industry. The first was APMP Commercial, a community specifically for those who work in the commercial or B2B proposal space. The only requirement to join either community is that you must be an APMP member.

An **APMP Capture** advisory team met in early October 2012 to launch new **APMP Capture** programs that will include:

- A minimum of six live educational webinars focussing on breaking Capture content
- A day-long APMP Capture Conference

More **APMP Capture** education, training and networking than ever before at APMP's Bid & Proposal Con 2013, May 28 – 31, 2013 at the Westin Peachtree Plaza, Atlanta, GA.

The series of six targeted **APMP Capture** webinars, beginning in November 2012, will address top opportunities and challenges for capture professionals and executives throughout the world. They will be hosted by the **APMP Capture** leaders and some will be held in conjunction with APMP chapters globally. The inaugural **APMP Capture** webinar will be presented by APMP's Colorado Chapter and APMP International. The webinar series will be priced at just $25 for APMP members and $60 for non-members.

The first ever *APMP Capture and Business Development Conference* will be held in Washington, DC in early 2013, targeting the industry's leading Capture and Business Development executives. Materials from the conference, which will focus on the capture thought leadership, economics, storytelling and what it takes to win, will be adapted into white papers and other useful industry resources.

Attendees at next year's APMP Bid & Proposal Con 2013 will benefit from specific **APMP Capture** educational training and content. They can expect a record number of **APMP Capture** community educational sessions from APMP, the first, best and only association with a 23 year history of delivering quality educational content to its more than 4,500 members.

Future plans for **APMP Capture** also include announcing a certification program exclusively for Capture professionals in 2013.

"When we put out our first call for our APMP Capture organizing committee more than 200 capture professionals signed on within the first week," said Amy McGeady, CEO of APMP and Vice President, Professional Services of Privia. "Now all capture professionals around the world have a home with APMP," said McGeady.

If you have not already done so and would like to be a part of the **APMP Capture** community or would like more information, please contact Rick Harris, Executive Director, at **rick.harris@apmp.org**, to learn how you can get involved.

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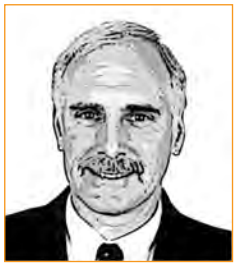

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Mission

- Our mission is: APMP is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations.
- 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.

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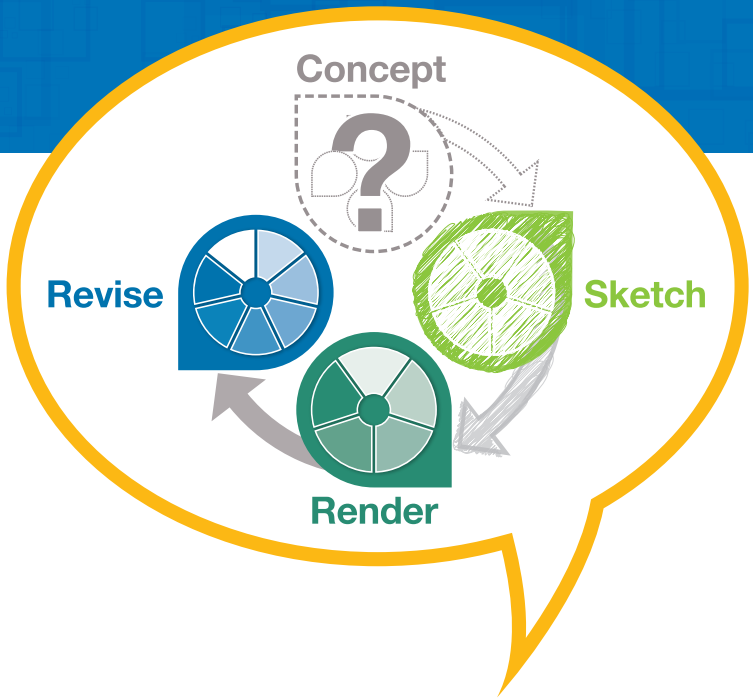

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APMP's mission is: APMP is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations. APMP conducts meetings and events both on a national/international scale and at the 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.

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

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

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

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email: lauren.williams@apmp.org

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

Advertising Rates and Guidelines

The following rates are effective through June 30, 2012:

Rates per Issue

Premium Placement Locations*
(Sold for both issues)

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

All Other Placement Locations*

- Full Page: $2,500.00 (4 Color)
- Full Page: $2,200.00 (B&W)
- Half Page: $1,500.00 (B&W)

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

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 Rick Harris at (202) 450-2549 or email info@apmp.org

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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IN MEMORY: John Elder

by: Eric Gregory

John Elder, former Managing Editor of the APMP Journal, passed away on August 22, 2012. John was also a fixture at APMP's annual and regional conferences helping then Executive Director, David Winton, any way he could.

John ran Proposal Production for CACI from 1999 until 2008 when he had to retreat from full-time employment because of his illness. He was known for his sardonic wit and his puns which he used liberally to great effect on anybody. But whatever John did, he always did it with fun in mind. He liked to poke fun at life in general and he gave of himself diligently in pursuit of excellence in the proposal business.

John was also an APMP Fellow, an honor he really appreciated and that made him feel part of a very large family indeed. John will always be remembered for his humor. He could liven up a conversation with it or drive you to a deeper conversation through humor as well. And no matter what, if there was work to be done, John was always there to pitch in and get it done. He was a perfectionist as well. It may have driven some of us to distraction, but we appreciated it when we needed the concentration on detail. John will be missed. He threw himself into the APMP work with abandon. We are a much better organization because of his commitment to our ideals and his service to us as proposal professionals.

whatever John did, he always did it with fun in mind

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

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

If you would like to submit an article, begin by reading these "Guidelines for Authors." They provide general guidance on manuscript preparation, scope of content, style, and methodology for submission and review. The following table provides

	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

The Journal's publication schedule to aid authors in determining submission milestones.

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 books
- 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.

Conflict of Interest

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

Objectivity

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

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WHAT IS A PROPOSAL PROFESSIONAL?

ERIC GREGORY

SENIOR VICE PRESIDENT, CAPTURE AND PROPOSAL DEVELOPMENT, CACI

KEYNOTE ADDRESS

APMP BID AND PROPOSAL CON
MAY 23, 2012

I am certain all of you possess some conception of what a proposal professional is.

But is it the right conception?

I want to thank the Association and Rick Harris for inviting me to deliver this address today. I have long wondered, given my 20 year association with APMP, what it would be like to stand here as a Keynote Speaker and present to this international assembly of experts. Now that I have my chance, I hope you find my conversation with you controversial, challenging, enlightening, and inspirational as I present to you my view of who we are, what we do, and the value we bring to our organizations.

What is a proposal professional? It is, after all, a kernel element in our name—the Association of Proposal Management Professionals. I am certain many of you believe you know exactly what a proposal professional is. I am certain many of you believe you can describe exactly what a proposal professional is. I am certain all of you possess some conception of what a proposal professional is. But is it the right conception?

Most of the time when we want to know what a proposal professional is, we look at it from a functional perspective. We define ourselves by what we do. We see ourselves as proposal managers, bid managers, capture managers, business developers, proposal coordinators, proposal writers, graphic artists, desktop publishers, infrastructure experts, process experts, and knowledge managers. We look at these roles, and maybe many others as well, and believe that what we see represents a proposal professional. But I am here to tell you today that not one of those roles I mentioned embodies a true proposal professional; for a proposal professional cannot be identified by or through a role. A proposal professional is not a function. Many can fill proposal roles and functions but far fewer can be or become true proposal professionals. A proposal professional is a state of being.

I might add, just to engender a greater degree of controversy, that achieving some level of accreditation does not create nor endorse someone as a true proposal professional. For in my world, a proposal professional cannot ever be represented by what we do. A proposal professional can only be represented by who we are. Proposal professional is not a skill; it is an attribute, an intrinsic characteristic so revealing and so tangible that there can be no mistaking who we are. The true proposal professionals are the warrior class in our organizations.

To think of ourselves as anything other than the warrior class in our organizations is to diminish the import of who we are and what we do. But when I say we are and ought to be the warrior class in our organizations what do I mean? How do I differentiate between the warrior class and all other classes in our organizations? And even more important, how do I get you to believe me?

What is a warrior class? Warriors are those who protect their societies from internal and external threats through defensive and offensive means. They protect people, property, territory, and culture. These are the inveterate wagers of war. In victory they bring stability and confidence to their societies; in defeat their societies succumb to instability and fear. They are the tools of politicians and strategists. They do not control many of the decisions regarding their engagements, but their will can deliver victories. Sounds a lot like us to me.

So we are first and foremost at the end of every day warriors, those men and women ready, willing, and able to deliver sacrifice for the continued existence of our organizations and for the benefit of all attached to our mercantile or non-profit entities.

As warriors then, we must recognize that our territories or boundaries are extensive. I do not speak of geographic boundaries but the recognition that as the warrior class we carry responsibility for three to four times the number of people our organizations employ. The defense and creation of jobs, opportunities, and growth in my fourteen thousand person company then can directly affect upwards of fifty six thousand people when we consider spouses, significant others, children, and aging parents or other relatives potentially dependent on our employees. In my organization, I expect this warrior culture and commitment to it to pervade everything we do. And if there are those who cannot make this critical emotional connection, then I would prefer they go work for someone else. As a proposal warrior, I prefer to reduce the abstractions of revenue, profit, growth, earnings per share, and shareholder value to the more tangible realization that when I fail and lose, people suffer, and that when I succeed and win people prosper.

To be effective proposal warriors, we must cultivate certain traits and attributes that go far beyond accreditation of skill and competency. Skill and competency are necessary but not sufficient conditions in the creation of a warrior and in the creation of a warrior class connected to a mission and a vision far greater than "the worldwide authority for the professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations."

Ten essential attributes describe for me the proposal warrior I want and the proposal warriors we need to be in our profession:

1. Courageous.
2. Committed.
3. Leader.
4. Decisive.
5. Agile.
6. Creative.
7. Disciplined.
8. Compassionate.
9. Intelligent.
10. Resilient.

Courageous

Courageous demands we perform under the fire of criticism and doubt. Courageous means we abandon consensus to do what we know is right. Courageous means we endure anger; we confront bad decisions; we criticize honestly and directly; we take on senior management when we must; we admit we have weaknesses and we supplement our teams to eliminate our weaknesses; and we rid our teams of poor performers swiftly because they can lead us to defeat.

Committed

Committed goes far beyond a willingness simply to put in the time to get something done. Committed demands a mission orientation, a recognition of the sacrifices necessary to achieve success, a selfless approach to achievement that renders ego superfluous and that can engender a team with uncommon zeal.

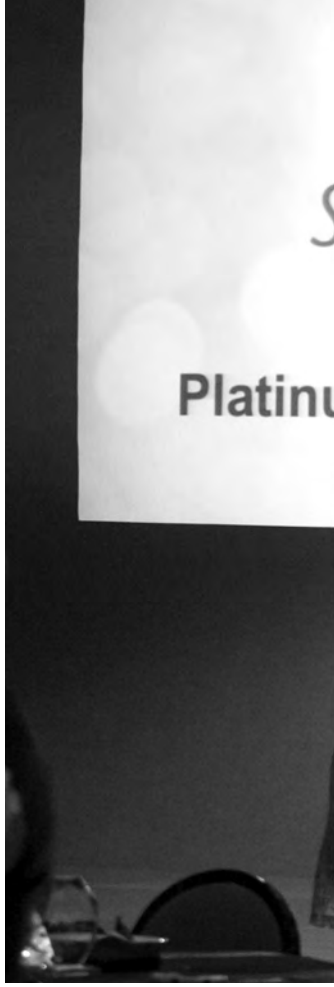
Leader means we become the example. We stand bold in the front of the competition and we never ask those around us to do what we won't do ourselves. We might

...we are first and foremost at the end of every day warriors, those men and women ready, willing, and able to deliver sacrifice for the continued existence of our organizations...

We demand excellence by example and promote fun through example.

We rule by cheer and provide uplift through humor.

We acknowledge and admire our enemy, and we sustain our teams through thanks.



impart our criticism to our teams, but we take the criticism directed at our teams. Others may doubt our eventual success, but we do not. We do not eat until the team eats. We do not rest until the team rests. When the team tires and complains, we are there to build them up and when post-Red Team they sit depressed and ready to give up, we remind them how easy it will be to make the changes if we just step back a moment and regain our perspective. When we win, they win. When we lose, it is on us the leaders. In confronting the enemy, we know no fear and when confronting the enemy within we speak the truth. We demand excellence by example and promote fun through example. We rule by cheer and provide uplift through humor. We acknowledge and admire our enemy, and we sustain our teams through thanks.

Decisive

Decisive demands action. When action is required, we take it. We insist our teams be decisive; we achieve progress daily in our struggles; we coerce, cajole, and co-opt as we must to achieve the actions that will lead to victory, and we never apologize for choosing action over inaction. We promote discussion, but we decide. We destroy the committee in favor of action and results.

Agility

Agility enables us to change direction rapidly as conditions change. The defeated always fail to react quickly to the enemy's change in strategy or tactics and therefore continue along the path of defeat until change comes too late. The agile warrior can change in a moment to react to a changing competitive environment or to a thrust and parry by a competitor on an instant opportunity.

Creativity

Creativity may well be the principal weapon in our warrior arsenal. With it we can overwhelm our enemy through surprise and superior force. We can flank, envelop, and dislocate. We can defend or attack. We can deceive and confuse. We can offer value to our customers our enemy cannot begin to imagine. We can find and exploit the enemy's weakness in armor, tactics, weapons, and strategy and we can bring down the mighty giant with a stone.

Discipline

Discipline enables us to achieve much with little wasted energy. Discipline enables us to act as a team, to multiply the effect of our individual contributions and actions to achieve victories against superior forces that might otherwise escape us. But discipline requires more than process. Process requires things, artifacts. Discipline requires attitude. I am reminded of two great demonstrations of warrior discipline from the American West. The first involves what came to be known as the Fetterman Massacre in December 1866. This event occurred as a part of Red Cloud's war against the U.S. Government when the government repeatedly violated treaties made with the Sioux or Lakota.

On December 21, 1866, a contingent of U.S. soldiers under Captain William Fetterman left Fort Phil Kearney in Wyoming to defend a wood train attacked by a decoy party of Sioux warriors. Fetterman, who had been ordered not to pur-

sue the Sioux and their Cheyenne and Arapaho allies beyond line of sight of the fort, disobeyed orders and pursued the attackers over the Lodge Trail Ridge while another decoy party, led by the young Crazy Horse, demonstrated immediately outside the fort to distract the command from sending re-enforcements. Fetterman led his force into an ambush by some two thousand native warriors. The Fetterman command was wiped out by a highly disciplined force that Fetterman regarded openly as inherently inferior to his own.

The second example revolves around the Nez Perce war of 1877. Chief Joseph and his small band of warriors, defending their people in an attempted escape to Canada, defeated the U.S Army forces sent to capture them no fewer than four times, inflicting significant casualties because they were disciplined, accustomed to dealing with the terrain, and willing to sacrifice their lives for the people. Several times they were surprised, and their aggressive, disciplined counter attacks disrupted U.S. Army discipline and allowed the Nez Perce to prevail and escape. Chief Joseph had about two hundred and fifty warriors. The U.S. Army had about two thousand. Only when Colonel Nelson Miles, known as Bearcoat, cornered the remaining Nez Perce at Bear Paw Mountain in Montana did Chief Joseph finally surrender, after many of his leaders had been killed. These are clear demonstrations of the power of discipline when we go to battle against our commercial antagonists.

Compassionate

Compassionate enables us to fight while not destroying our teams. We drive hard. We work hard. We refuse to give in to fatigue. We suffer. But when we must, we take and give rest. The warrior in us must be renewed lest we find ourselves, as did Chief Joseph's band of Nez Perce, incapable of continuing the fight.

Intelligence

Intelligence gives us the ability to define capture and proposal strategies and tactics that lead us to victory. Intelligence without the other attributes can be wasted, however. The warrior in us needs intelligence, but first we must embrace and exhibit the other attributes. Intelligence does not make a warrior, but it can make a warrior more successful. I am not a particularly intelligent man; but in my 35 year career, I have prevailed by using my other attributes and the intelligence of others to win my victories and to counter my defeats. That may well be the power of intelligence in our profession.

Resilient

Finally, we must be resilient. We must have the will to carry on under the most adverse conditions. The warrior's fate must be to do battle with external and internal forces that would defeat the average human. For that reason alone, if we choose to walk the warrior's path, we cannot be average—our resilience alone must raise us up beyond those who cannot or will not work as hard, or as long, or with the same fervor we demand of ourselves every day.

And so we covet these attributes as the means of achieving safety, security, and prosperity for our organizations, our societies. Without them, we and our enterprise societies collapse.

Our value to our organizations, our enterprises, and our societies lives through our ability to become and remain that warrior class. To me, that becomes the real definition of a proposal professional.

But somehow we have to convey our value to our organizations as proposal warriors. We cannot necessarily expect our colleagues, our managers, our executives, or even our shareholders or Boards of Directors to see what we do, how we do it, and see the absolute value we bring every day as proposal warriors committed to the success and well being of our chosen organizations. To some degree that is our burden. As proposal warriors we accept our station gladly and accept that station frequently without expectation of special acknowledgement. We frequently see our station, if we accept the concept of proposal warrior, as a duty only, one that accrues value to us alone as individuals because we believe that what we do as a warrior class must be reward enough. We neither seek nor demand special recognition. We believe that growth, win rates, capture ratios, news releases, win parties, letters of commendation or simple bonuses fulfill the need for recognition and reward that should be accorded those who make significant sacrifices for the good of their societies. But many times these accolades are not enough and we, the warriors that we are, come to believe that our societies fail to appreciate us as they should. We come to believe that the value we impart to our organizations cannot possibly be returned to us equitably, that somehow our colleagues, our managers, our executives, and share holders, and our Boards of Directors do not know nor understand the full measure of value we bring with our warrior attitudes and attributes. And we would be right.

That does not mean we need to accept a lesser value from our organizations. We should, however, devise strategies and methods by which we convey who we are and what we do and convey clearly and precisely the value we deliver as proposal

...we are the competitive edge

We are the difference between enterprise life and death.

We should never forget that.

warriors. When people truly speak of the pointy end of the spear—that's us. When people speak of the vanguard—that's us. When people speak of the pioneers and the adventurers and the phalanx or the legion or the cavalry or Native American warrior societies such as kit foxes, dog soldiers, crazy dogs—that's us. The value we deliver cannot be more tangible than the continued prosperity of our organizations, the people who work in those organizations and who are supported by those organizations.

Just as ancient, recent, and modern warriors would recount their deeds and successes for their societies so we should recount ours for our societies. We should use the oral and written traditions to tell our stories much like we tell the winning stories we create for our winning proposals. When the battle is done and the war over and we have been triumphant and we have preserved our society and expanded its influence in the market place, we should celebrate our stories at special events to remind those who have prospered because of our sacrifices that they owe us nothing more than the respect we deserve as the warrior class. We deserve to have our deeds recounted. We deserve to have our stories told. We deserve to be held up to the young and advancing as exemplars to be emulated because of our commitment, our sacrifices and our successes. We become the culture of our organizations.

When I was at Hughes Aircraft we were the company that stood up to Congress and we fought like it against our enemies every day. We individually wanted to be the legend that Howard Hughes created and we attacked every opportunity to win as though we had been surrounded by the enemy and our only way out was to win. Our reward was that we usually did win, and we preserved our culture because we preserved the story that became our corporate legend each time we won. Each of us can do the same in our organizations today. As proposal warriors, we become the legends if we create the story. That might be our greatest reward. To our organizations that might be our greatest value-- that we create the winning culture that enables us to survive the recessions, the market dislocations, and the intensely competitive marketplaces that continue to evolve with a rampant ferocity unprecedented in human history. Our value must be that as proposal warriors we are the competitive edge. We are the difference between enterprise life and death. We should never forget that.

Because we have become proposal warriors, I do not see you as capture managers, as proposal managers, as proposal coordinators, as production personnel, as proposal writers, as business developers, as process experts, or as subject matter experts. I see you as warriors I can lead into the most difficult of competitive situations and environments and we will prevail together against our enemies. We will defend our people, our territory, and our culture against those who would take from us and we will take from them what they prize most—their market share.

Unless we invoke the warrior spirit that can fill us with competitive zeal, we shall forever be no more than managers, experts, coordinators, artists, writers, and developers. We will never be the protectors and defenders of our unique societies and their cultures. If we embrace the warrior spirit, our organizations shall prosper. If we do not, over time, they shall wither and die and our legends, our stories, our sagas, our epics, our legacies, and our rewards shall perish with them.

So let us therefore remind our organizations and ourselves daily that we are the Association of Proposal Management Warriors.

EFFECTIVE vs.

INEFFECTIVE Leadership

By: Lisa Wetzel

What kind of leadership approach do you use as a Proposal Manager?

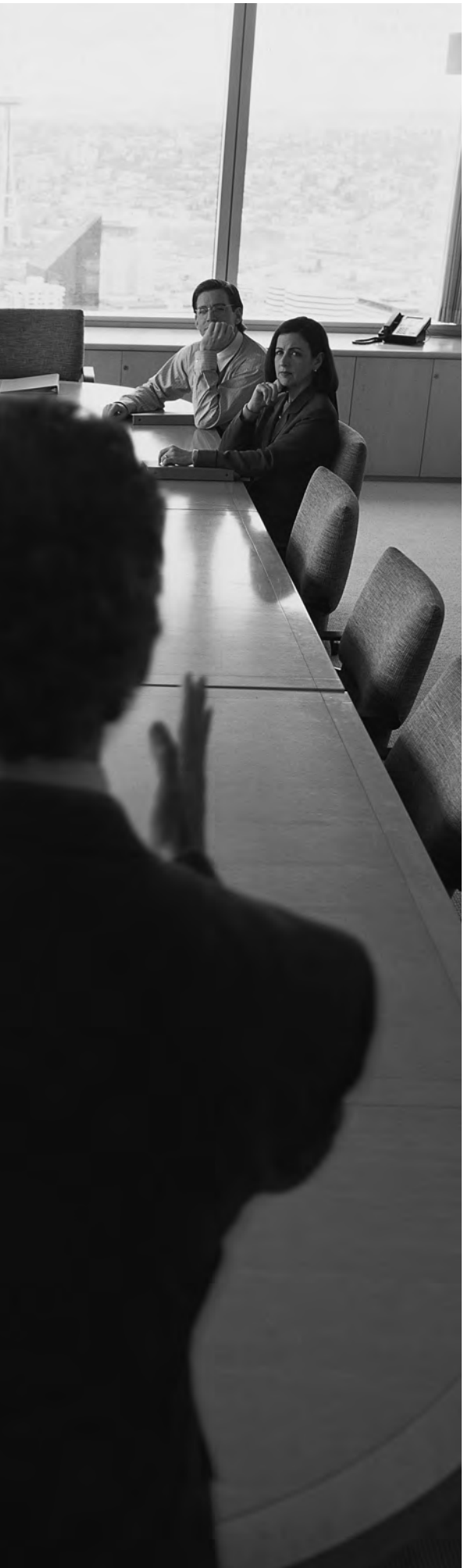
The demanding, competitive field of Business Development (BD) offers the best and worst of the contracting world because of its immense expectations and incessant internal and external pressures. Proposal development is one component of the BD lifecycle that directly impacts final success or failure during the pursuit of contracts to grow a business. As such, BD is vital to the procurement process within organizations. Successful proposal teams are defined by leaders who empower members to participate in decision-making, manage delegated portions of the process, and use and expand their skills. Empowered proposal development teams are satisfied with their positions and motivated to contribute time, energy, and resources to submit successful bids and ultimately increase revenue.

Leadership styles have an impact on employees throughout an organization, including individuals who are only indirectly connected across departments. There is a stark contrast between the characteristics that define effective and ineffective leaders, and research reveals that motivated employees have an affinity for a set of common values. A Gallup Poll of more than one million work teams that included more than 20,000 in-depth interviews with leaders, and drew on 50 years of Gallup Polls about the world's most admired leaders, revealed that the most desired characteristics in leaders are trust, compassion, stability, and hope. (Gallup, 2012, 1)

Some leaders effectively lead and motivate those around them while others ineffectually fill the role of a commander who is driven to complete a mission. Effective leaders are "always investing in strengths…". They "surround themselves with the right people and then maximize their team, and understand their followers' needs." (Gallup, 2012, 1). On the other hand, ineffective leaders tend to de-motivate subordinates, dictate expectations, and demoralize those supporting them because they are focused on the work instead of the people performing the work. In a demanding environment, effective leaders are essential to team success because they serve as primary motivators and ensure team member accountability across all task areas. As stress increases, the role of the leader and the camaraderie of the team become more relevant and vital for the growth and success of the group.

Proposal development takes place in a very stressful environment and is arguably one of the most demanding professions. The most stressful environments include tasks that require decision-making, consistent monitoring of devices or materials, and the repeated exchange of information with others. (Paulus, Seta, and Baron 1996, 398). These three elements are included in the job descriptions of all proposal development team members, and vary only slightly depending on the assigned role(s). Overall, stress is a crucial factor that cannot be ignored when millions of dollars are at stake and there is no margin for error.

Ineffective leaders have a set of commonalities that are driven by several similar perspectives, and share characteristics that can deconstruct team environments



and risk the group's productiveness. For dynamic proposal teams, ineffective leadership can stifle the development process, create undue stress, and waste limited resources.

Over the course of the 300+ proposals I have supported, I have worked in many effective and ineffective BD infrastructures under the leadership of Executive Vice Presidents, Vice Presidents, Opportunity Managers, Capture Managers, and Proposal Directors. Primarily, the style of leadership exhibited by the most ineffective leaders was a dictatorial approach that consisted of demands, criticisms, and even outbursts directed at the proposal development teams supporting them. In contrast, the effective leaders were positive, engaging, and complimentary. They inspired participation. Somehow, there was a correlation between the style of leadership and the value of the information used in developing the proposal that alleviated stress.

Capture Managers were the primary leaders for opportunities I supported, and I noted that the ones who were prepared with a defined strategic plan, win themes, discriminators, and pre-determined past performances were less stressed and more willing to encourage participation from the team members to contribute ideas and provide insight. Less prepared leaders with limited information, poor planning, and undetermined teaming partnerships were more likely to demonstrate dictatorial characteristics. Proposal managers who lead proposal development teams experience similar outcomes in accordance with their leadership styles.

Over time, as I noted that how different styles of leaders impacted the momentum of each proposal process, I decided to research the styles used in constructive environments, and to compare and contrast them with teams directed by dictatorial leaders. My research led me to two conclusions:

1. The dictatorial/authoritarian leader demoralized and frustrated the proposal teams through negative criticism, tight control, and frequent demands.
2. The positive, inclusive leaders inspired participation and creativity by showing an interest in members of the team and acknowledging their performance.

Once I identified these differences by researching documented behavior and leadership styles, I tried to determine if the differences were dependent on styles or levels of maturity. These questions could not be fully answered from current research; however, I found enough information to help me put this idea in perspective.

Leadership Styles

Although leadership models present various types of leadership styles associated with a plethora of characteristics, I focused on the two most prominent types of leadership that I experienced in proposal development. There are two contrasting leadership styles that support my experience within BD environments: the authoritative/dictatorial leader and the participative leader.

Authoritative/Dictatorial Leaders.

The authoritative/dictatorial leader applies a leadership style associated with officious communication and a dominating decision-making process. These

Some leaders effectively lead and motivate those around them while others ineffectually fill the role of a commander who is driven to complete a mission.

terms, used interchangeably, depict a type of leader who is often insecure about succeeding and may harbor fears of failure. Such coercive, controlling authoritarians are also called autocratic decision-makers. Those around or under such leaders may incur menial demands and act to establish authoritative control, which minimizes their value. The members of teams led by authoritative/dictatorial leaders may face frequent, direct, and open criticism, and may be caught off-guard by derogatory remarks regarding their skill sets and/or experience.

This type of leader requires close oversight and control within a contained environment. Without this they can become a liability to the overall structure of the BD team. These leaders tend to be more concerned about the product or service than the people performing the work. They value performance over relationships and measure success by how they are personally perceived by those above them.

Authoritarian leaders "keep objectives to themselves, distrust their subordinates, delegate very little, and try to do too many things themselves" (Hodgetts, 2002, 262). Individuals who need to exude power over a group or process may derive this style from their fear of failure, fear of disappointment, or simply a need to feel in control. They compulsively focus on imperfections and minimize success in order to keep a focus on the overall mission and ultimately appear successful.

I have noticed that these individuals tend to make a lot of "noise" about what they are personally doing to ensure the success of the team and openly criticize anyone who may challenge or pose a threat to their position. Noise is often expressed through excessive meeting requirements, public belittling of subordinates, exaggerated metaphors when referencing an understanding of customers and their requirements, and inordinate reporting requirements. Such leaders have an incessant need to maximize their personal credit and minimize blame. Individuals who do not fully understand their team members' or their own positions posture themselves in a defensive state to avoid questions and accountability for their behavior.

Often times, the "noise" is an effort to hide what such leaders are not doing or have failed to understand. Since individuals usually recognize these kinds of insecurities and shortcomings, this behavior results in negative consequences, including loss of interest, rebellion, or even sabotage in opposition. Executive leadership needs to recognize when this style of leadership becomes detrimental, and either provide mediation or remove such polarizing figures.

Dictatorial leaders typically make most or even all decisions themselves, and then enforce those decisions on others by using authority and material rewards to coerce obedience. Sometimes they ask for

participation, then promptly dismiss it and choose an alternative solution simply because they feel the need to assert their authority. This militaristic approach creates negative energy, minimizes positive performance, and ultimately demoralizes the team.

It should be noted that some individuals need the strong guidance and discipline of an authoritative leader. Such individuals tend to get distracted or consumed by other projects if they do not have a negative consequence for drifting or ignoring requests to provide services. Unfortunately, these individuals serve to reinforce the leader's rationale that the members of the team cannot be trusted and must be told what to do, how to do it, and when to complete it.

Dictatorial leaders derive their authority from one or more of the five areas of political power: coercion, rewards, legitimacy, expertise, or reference. Power references the level of influence one has over others to behave in a certain way. "Leaders use power to attain group goals, and power is a means for facilitating their achievements." (Robbins 1998, 154). Autocratic leaders use coercive power, which is defined by fear. "The power to hurt others is possibly most often used, most often condemned, and most difficult to control." (Robbins 1998, 155). Coercion increases "hostility, resentment, lies, threats, retaliation, revenge, and distrust." (Johnson and Johnson 2000, 256). Overall, they strive to lead by force, using negative consequences as their bully pulpit for dominance.

One researcher coined it best by stating that "instead of bullying and shouting, or otherwise being autocratic, [leaders] should avoid making an employee feel intimidated or overly uncomfortable… Although the autocratic approach will get obedience, it will not inspire the dedication needed in a strong organizational culture." (Lamberton and Minor 1995, 150). According to the Gallup Poll mentioned earlier, "when leadership fails to focus on individuals' strengths, the odds of an employee being engaged are a dismal 1 in 11 (9%)." (Gallup, 2012, 1). However, when companies focus on employee strengths, the odds change to almost 3 in 4 or 73 percent.

Most of us have encountered Capture Managers who drive the proposal team to tears. I have witnessed many encounters and clashes that were devastating and detrimental to the proposal development process. The Capture Managers on such efforts divert and distract the process. More often than not, they involve a power struggle where no one wins. Demands may illicit compliance, but they do not inspire participation, creativity, or innovation, which are all important components of compelling proposals.

All dictatorial leaders are not evil and they do not always dislike or mistrust those who work around them or under them. They simply distrust or devalue the contributions of the team, and take the ultimate success or failure of the team personally. This style of leadership must be managed carefully to avoid perpetual anxiety and undue stress. To improve the process, such leaders should be held accountable to their supervisor(s), peers, and those reporting to them, and should understand the value of leading instead of demanding.

Cooperative/ Participative Leadership

The second type of leadership I have noted is less prevalent but more effective in proposal development. It is known as participative, or cooperative, leadership. Cooperative/Participative leaders are generally confident, secure, constructive, positive, and inspirational. Rather than fear of failure, they expect performance from professionals and provide clear direction and courses of action to ensure it. They openly delegate responsibilities and are not threatened by success or failure. They provide useful, constructive criticism and critiques when necessary, but they also inspire their teams through concern and encouragement.

Cooperative/Participative leaders have "a high concern for people and an equally high concern for getting the job done." (Lamberton and Minor 1995, 374). "While an authoritarian leader is busy telling the personnel what to do, the participative leader is getting information on what is going well and what is going poorly." (Hodgetts, 2002, 262). The participative leader knows they are the principal boss, but they have the confidence to model participative decision-making instead of demanding submission to a pre-determined direction.

Cooperative/Participative leadership invites and stimulates the entire team's inclusion and involvement. It "allows everyone to give input when decisions that affect the whole group are made." (Lamberton and Minor 1995, 150).

"Although the autocratic approach will get obedience, it will not inspire the dedication needed in a strong organizational culture." (Lamberton and Minor 1995, 150)

Today's employees prefer following a predetermined structure or process instead of adhering to someone's control. "When structure is present, employees know what is to be done but realize that they have some latitude in how to complete the task. Today's better-educated and better-informed employees appreciate structure but usually react negatively to too much control." (Reece and Brandt 1999, 317). Evidence shows that participative decision-making may also increase commitment, morale, and profitability as well. (Paulus, Seta, and Baron 1996, 320).

Cooperative/Participative leaders focus on recognizing and motivating their teams by ensuring they personally are available, approachable, and engaged in the proposal development team. Individuals need to see and hear that they are appreciated as much and as often as they deserve it. This positive reinforcement motivates employees and propels them to engage in the organization they support.

A proposal development team can thrive under a positive, enthusiastic leader who enables them to contribute and participate in the process. Based on positive interdependence, the most effective teams share distributed leadership with power that is based on expertise. (Johnson and Johnson 2000, 23). Each team member offers a special skill set or niche area of expertise, and needs the freedom to do their job or perform their function. According to noted leadership guru John C. Maxwell, "leading well is not about enriching yourself – it's about empowering others." (Maxwell 2007, 146). Today, several large organizations have embraced this idea of empowerment, including Intel, GE, Ford, Saturn, Harley Davidson, Goodyear, and others. (Robbins 1998, 381).

Cooperative/Participative leaders recognize that they are more successful when the team chooses to follow their guidance instead of being forced to comply through coercion or bullying. They understand that obtaining cooperation and productivity through positive communication reduces the perception that a leader is "cracking the whip" over employees, and results in "a more enthusiastic climate." (O'Hair, Friedrich, and Dixon 2002, 173).

Cooperative/Participative leaders must guard against slackers or loafers who may misconstrue their positivity as a weakness. During my time supporting proposals, I have encountered several team members who repeatedly ignored deliverables and schedules under the guise of working independently. These types of team members must be held accountable with negative consequences that personally impact their positions. Strong leaders are responsible for implementing processes to support committed team members and reprimand those who take advantage of the open environment or jeopardize the team's achievements. Over my years in business development, I have seen editors take days to review and edit a short document; a graphic artist who spent weeks working on a single project; writers who spent weeks writing short documents; and reviewers who spent hours "reviewing" documents without reading them. Because these types of workers do not innately respect cooperative/participative leaders, they must be managed with aggressive deliverables and transparent accountability.

Even though Cooperative/Participative leaders facilitate activities instead of dictating them, they may use their positions to coerce and persuade those supporting them to meet goals that are self-serving and provide little value to the collective team. Destructively, this style of leadership can also serve as a means of securing recognition for positive outcomes and limit accountability for the leader. In *The Corrosion of Character*, Richard Sennett warns against the facilitators who repudiate "authority and responsibility in the very superficialities of flexible teamwork structures." (Sennett 1998, 114). He warns against the politician who coerces participation by mastering the art of "wielding power without being held accountable; he has transcended that responsibility for himself, putting the ills of work back on the shoulders of those fellow 'victims' who happen to work for him." (Sennett 1998, 115). Team members should always work alongside their leader with cautious optimism to ensure they maintain awareness and contribute honest feedback to the others in their group.

Cooperative/Participative leaders serve as coaches and mentors to those under their leadership who can inspire and motive others to apply their skill sets and increase their knowledge. Research reveals that mentoring increases job satisfaction and, subsequently, the likelihood of success. (Lamberton and Minor 1995, 376). When employees are empowered and equipped, they form strong, organized, focused teams with the confidence and ability to produce compelling proposals. When I began to support proposal development as a graphic artist, for example, I was mentored by a veteran Director who inspired me to begin developing themes, writing, and strategizing with the team. Over time, I have learned to understand all elements of the process, including my own strengths and weaknesses. The coaching and inspirational motivation I received from this Director changed my view of my role in business development.

Great leaders create a shared vision,

Cooperative/Participative leaders must guard against slackers or loafers who may misconstrue their positivity as a weakness.

build internal and external relationships to support it, and distribute leadership responsibilities to ensure the vision comes to life. "The equalization of participation and leadership makes certain that all members are involved in the group's work, committed to implementing the group's decisions, and satisfied with their membership." (Johnson and Johnson 2000, 13). Part of my time is spent working with BD teams to determine the most effective tools for managing capture and proposal documents. In most teams, I encounter power struggles over who makes the final decisions on how the content is presented and managed. On a few projects, though, I have worked with a strong leader who inspires the team with a documented vision that distributes the project tasks based on each team member's skill sets and experience. Interestingly, when this occurs, the project moves swiftly, smoothly, and efficiently through development, because everyone has a mission, feels valued, and shares the vision of the overall goals.

Organizations must examine their current leadership team's characteristics and determine if they are fostering effective leadership styles that inspire employees to fully engage in proposal development. Leadership IQ CEO, Mark Murphy reports from in his research of more than 500,000 employees and leaders that "72% of all employees admit they are not giving 100%." (Murphy, 2012, 1). The cost of this disengagement is unfathomable and could be addressed by implementing an environment that is founded on active participation across all levels of an organization.

Changing Behaviors

No doubt we will all continue to support dictatorial leaders and we need to be prepared to provide the proper response to unacceptable behavior. I propose the following set of tools to impact and alter negative behavior, including options to change the conditions that precede the behavior; change the consequences that follow the behavior; and open communications to modify or alleviate issues associated with the behavior.

It is important to maintain a positive perspective about any situation and ensure that our attitude does not reflect negativity around us. "Research supports the conclusion that it is not so much what happens to us but our attitudes toward

these events that determine the degree to which we experience negative effects in response to generally stressful events." (Paulus, Seta, and Baron 1996, 409).

Attitudes are the primary foundation underlying our behaviors. Our attitudes are more important than our circumstances, and have a greater impact on our success. Viktor Frankl's book, *Man's Search for Meaning*, one the ten most influential books in the US, states, "The last of the freedoms is to choose one's attitude in any given set of circumstances". (Reece and Brandt 1999, 164).

Once we know who we are and have the confidence to maintain a positive and confident attitude, we can begin to influence those around us. We can help others alter their attitudes by ***changing the conditions that precede the behavior*** (also known as operant conditioning). For example, one director I supported had difficulty approaching a team member because she consistently complained that she was overworked and felt she never received enough advance notice on upcoming projects. To modify the negative response, she created and published a master calendar that predicted the upcoming projects with tentative dates for the department and was managed in real time. This action alleviated the stress of unknown requests for this team member, who then became engaged in the process of predicting timelines once she understood how much activity was taking place and had advance notice of upcoming projects.

On a smaller scale, incremental modifications can impact our environment. For instance, if we know that showing up early for a meeting is important for a leader, we can ensure that we show up before the meeting start time and offer a friendly and positive greeting when we arrive. No matter how anyone else is acting, the positive energy cannot escape the room unless we let it. By recognizing and incorporating operant conditioning, one small action may be the beginning of many other positive events.

Second, we can influence others by changing the ***consequences that follow the behavior***. (Reece and Brandt 1999, 161). For instance, do not allow someone to directly demean or belittle you without following up with that person as quickly as possible. Preferably, this should be done in private and not in an open forum, even if you were criticized publicly. Confront directly targeted criticism, especially if it is unwarranted and unfair. Take accountability for your areas of responsibility but do not accept the blame for issues outside the scope of your tasks.

Unfortunately, we sometimes inherit unresolved issues that cannot be resolved through mutual dialogue and negotiation. In these instances it is helpful to approach the opposing parties separately, to decipher their objectives and goals and to eliminate the distractions and damage such opposing positions may be causing to the team. This assertive approach may discourage future derogatory remarks. Many times, issues arising from these positions are predicated on completely different concerns, and should be resolved independently. The initiation of open discourse with a moderator from a neutral third party will resolve most issues; however, in some cases, we need to take the initiative by approaching and addressing the underlying concerns that give rise to the issues and support the distractions.

Third, maintain open communications but do not foster resentment or negative attitudes. Focus on issues, not individuals. If you are supporting a domineering leader, be sure to remain confident, honest, and open about your skill sets and reportable activities. Transparent accountability breeds confidence and will alleviate some of the issues you might normally encounter with dictatorial leaders. On the same note, be sure to hold the leader accountable as well. More often than not, a bully is more approachable in the corner than on the playground performing in front of a crowd. Dictatorial leaders seek to enforce their authority by demanding compliance and respect through fear and coercion. Effective leadership requires neither; it simply cultivates legitimacy through mutual respect, inspiration, and trust.

People are more receptive to accountability when they are not in a public, defensive position. Approach an authoritative and/or domineering leader privately or with a neutral party to confront behaviors that are unacceptable. Most people want to appear in the best light to others. When they understand how their actions may be perceived negatively, they are more likely to listen and consider an alternative approach. As the assertive confronting party, remain in control of the conversation and approach the situation by incorporating the following actions:

- Be assertive but not accusing.
- Maintain a neutral attitude and avoid insulting or disrespectful language.
- Write down and rehearse the primary points you need to make.
- Address specific events and do not make assertions or use absolute terms such as always, never, all the time, etc.
- Provide alternative behaviors that could have made a different impact.
- Provide an overall solution for moving forward that mutually benefits everyone.
- Leave the incident in the past.
- Be discreet—do not discuss the specifics of the meeting with colleagues.
- Follow up with a note to document the discussion that took place, to instigate accountability and, in some cases, deter future behaviors.

If circumstances cannot be resolved through a personal approach, documenting the events and your actions can support your case to Human Resources. Be sure that you have either an equal or superior colleague to advocate or support the events and activities you document and report.

Finally, organizations must discourage ineffective leadership styles and embrace participative platforms that motivate and engage their employees. They must implement policies and practices to hold unproductive leaders accountable for their behaviors through deterrents or penalties, and maintain open-door policies for reporting unacceptable conduct. Genuinely effective teams are composed of individuals who demonstrate mutual respect, commitment, and active participation in activities that perpetuate opportunities for individual and organizational growth.

Assessing Proposal Leadership in Organizations

Organizations must assess the value of cooperative/participative leadership and determine how to curb the cost and impact of authoritarian/dictators. I found no research to conclude if authoritarians/dictators can be conditioned or trained to become cooperative/participative leaders, but I assert that acknowledgement and accountability will circumvent unnecessary stress and hardships over time. I contend that if they are resolute and committed to success, authoritarians/dictators can mature into confident, trusting leaders when given proper guidance, tools, and resources.

Overall, research provides documentation for understanding the characteristics of different leadership styles, but does not demonstrate them in levels of succession. Subsequently, the idea of maturing attributes is open for exploration. It should be examined in order to maximize the contributions of existing leadership within organizations.

It is evident that the two prominent types of leaderships within BD environments present distinct characteristics and incite different behaviors. The authoritarian/dictatorial leader inhibits or deters contributions while the participative leader inspires action from their team. While neither style is flawless, the cooperative/participative approach within the proposal development environment is ideal since it engages contributors and inspires involvement.

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How to Create Winning Proposal Themes

Chris Simmons

A winning proposal is all about standing out from the competition by capturing the attention and the imagination of proposal evaluators. Compliant and compelling proposal themes can make the difference between winning and losing your next bid by providing evaluators with the reasons to pick your bid. In an increasingly competitive marketplace, proposal teams need to be more efficient and effective in their approach to theme development.

Are you ready to win more?

Executives, business developers, capture managers, and other proposal professionals naturally want to win more business. That is their job. However, many think that the harder (or longer) they work, the more business they will win. They constantly seek to strike a balance between pushing their teams to the limit (work more) in order to win more. The idea of increasing proposal development efficiency and effectiveness at the same time (winning more while working less) may seem counterintuitive. However, it is a basic proposal concept that dates back to the 1960s.

This article unlocks some of the mystery behind creating winning proposal themes as the basis for developing more efficient and effective proposals (winning more *and* working less). It discusses how to stand out from the competition by exploring the following topics:

- **What is a Theme and Why is it Important** includes the definition of a theme and the positive impact of theme development in the proposal process.
- **Features and Benefits** takes a closer look at two of the primary components of winning proposal themes.
- **The Proof is in the Pudding** describes how to get the most out of your themes by providing differentiating proof for the features and benefits that truly set you apart from the competition.
- **A Method for the Madness** introduces a simple, proven methodology for developing winning proposal themes that are compliant and compelling, and that position your company to win.
- **Win More and Work Less** concludes with common theme development challenges, theme development tips, and suggested reading to help you win more and work less.

What is a Theme and Why is it Important?

When you think about it, proposal writing is really about telling a story. A story about how your solutions to problems are better than your competitors' in ways that really matter to your customers.

All too often, the story is written by authors who are responsible for different chapters of the story. These authors have no clear idea of the setting (understanding the need), the plot (solution), the characters (key personnel), the ending (customer benefits), or the moral of the story (themes).

When the proposal manager puts all of the sections together for the first time, it is no wonder that the feedback is all too predictable: "solutions are not clearly articulated", "claims are unsubstantiated," and "compelling themes and discriminators are missing."

Most proposal teams understand the value of developing themes as the basis for telling the story their customers want to hear. However, very few teams take the time to develop the features, benefits, and supporting proof in sufficient detail to achieve the happy (winning) ending they seek.

> "Very few teams take the time to identify the features, benefits, and supporting proof in sufficient detail to win."

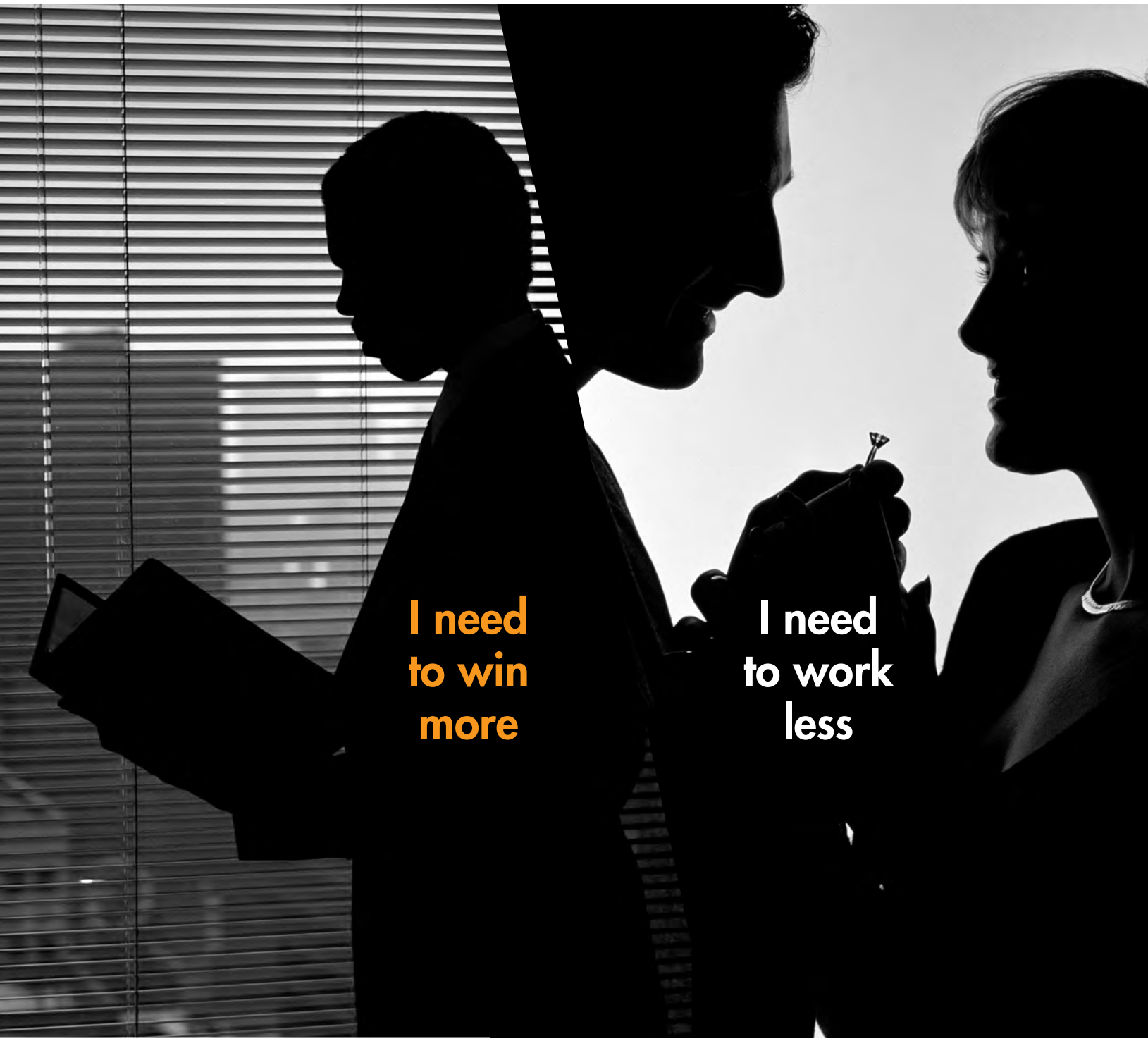
A Theme or a Dream?

Capture managers and sales executives are often quick to claim how well they know their prospective customers, how they are uniquely positioned to win new business, and how they have defined the themes the proposal team needs to write a winner. More often than not, these so called win themes are nothing more than vague, generalized statements that hardly distinguish their company from any other bidder.

The following win themes were posted on the war room wall of one of my customers pursuing a $2 billion contract (code name: DreamThemes), and serve as a vivid example of what win themes are NOT.

Proposal Win Themes?

- Best value
- No risk
- We understand you better than anyone else
- CMMI Level 3 best practices
- Relevant past performances
- Superior technical solution



strike a balance between pushing your team(s) to the limit (work more) in order to win more

The DreamThemes were literally dreamt up by the capture team during a lunch meeting. These win themes lack the detailed features, benefits, and proof required for a compliant and compelling proposal. Posting them on the proposal room wall brainwashed the team into thinking that they had a winning approach and were ready to write.

After taking over responsibility for the management of this proposal, our team quickly developed a more compliant and compelling set of themes. We were under extreme time pressure and had to limit the theme development process to a focused 2-day effort. Our team developed the customer-focused themes that were missing from the proposal. Despite our heroic efforts, however, we lacked sufficient capture planning information and were not sure our themes were compelling enough to win.

In stark contrast, another one of our customers (code name: MeanThemes) insisted on spending over two weeks developing a 15-page theme document after the RFP was released. The MeanThemes document included five high-level win themes, each with 4-6 volume-specific sub-themes. The theme document included scores of section- and requirement-level themes, with detailed features, benefits, and differentiating proof statements at each thematic level. The MeanThemes were shared across the entire proposal team. They provided high-level guidance to the writers, and served as basis for an Executive Summary that virtually wrote itself. We were all convinced that we had developed a very comprehensive set of proposal themes, and were confident we were on the path to a winning proposal.

Author Note: Despite their early win theme challenges, DreamThemes (2-day theme rush job) won the $2 billion dollar multiple-award Blanket Purchase Agreement and was the only new bidder selected from a group previously dominated by incumbents. Ironically, MeanThemes (comprehensive multi-week theme development effort) lost their $40 million single award to a lower-risk technical solution with a significantly higher price. The winner was the incumbent.

What is the ironic moral of the story? Sometimes even the best proposals, those with the most compliant and compelling themes, cannot overcome some overriding factors like incumbency and price.

What is a Theme?

Proposal experts define a theme as a "central idea (feature and benefit) that is supported or proved." Most of these experts agree that, other than price, themes and supporting proof-points are the most effective way to distinguish your proposal from the competition.

Themes are really the fundamental building blocks for telling a compliant, compelling, customer-focused story. They are not sales slogans. Most slogans are easy to remember catch phrases like the popular *Washington Post* slogan: "If you don't get it…you don't get it." This slogan is easy to remember, but lacks any real subscriber features, related benefits, and supporting proof such as

"Proposal experts define a theme as a "central idea (feature and benefit) that is supported or proved.""

readability, cost, readership, breadth and depth of content, customized subscriber packages, and so on.

What is a Win Theme?

The term "win theme" is commonly used throughout the proposal industry. The use (or misuse) of this term contributes to the general confusion about themes. Win themes are higher-level (Meta theme) features and benefits that transcend the entire proposal. Effective proposals usually have no more than one or two win themes that are focused on what customers care about the most—things like increased efficiency (faster), increased effectiveness (better), lower cost (cheaper), and lower risk (safer). Win themes are relatively easy to develop, but are hard to develop in ways that differentiate you from the competition. The more difficult challenge is to develop a hierarchy of proposal-, volume-, and requirement-level themes (with increasing levels of detail) to support each high-level win theme.

What is a Proposal Theme?

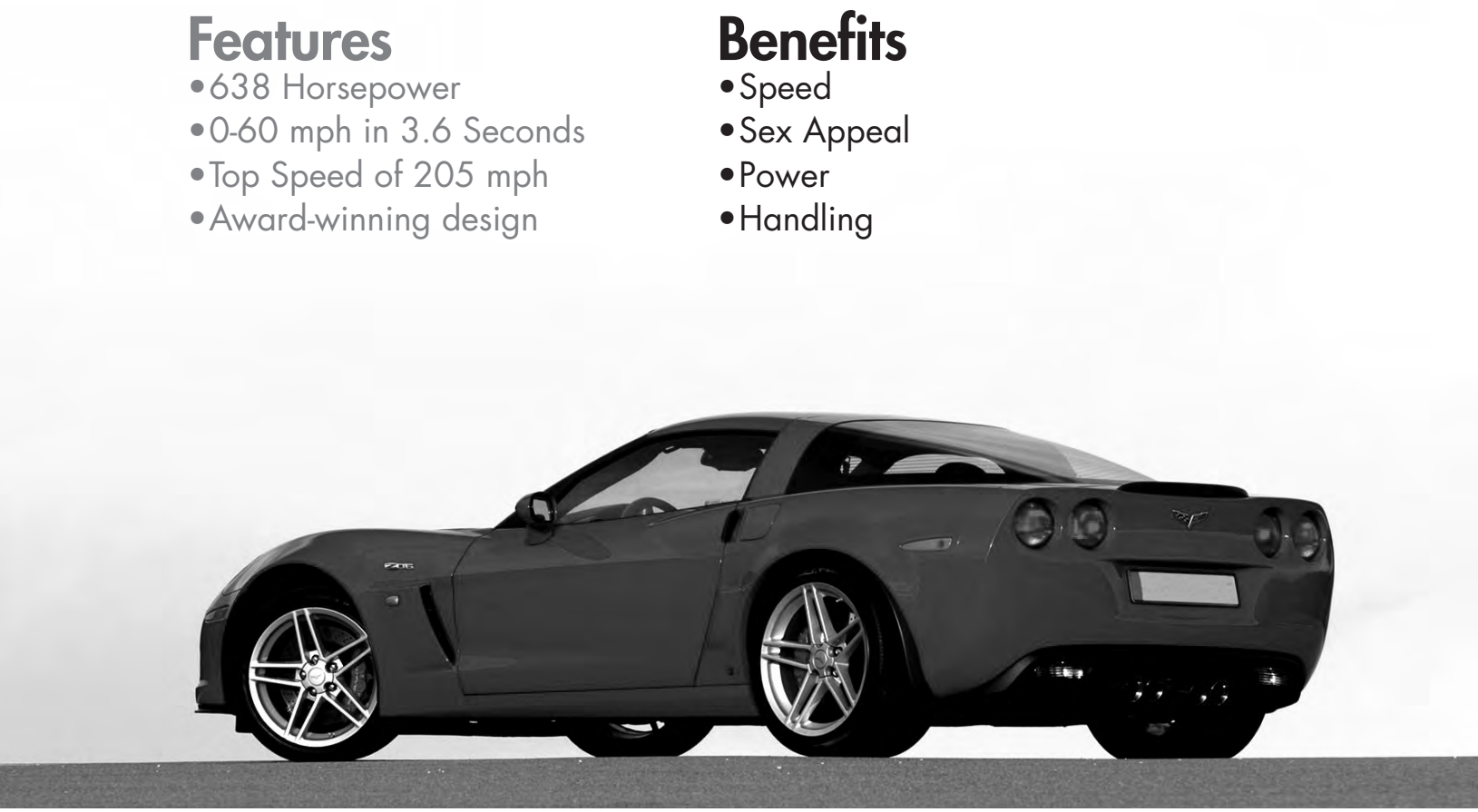
When capture and proposal managers refer to win themes, chances are they really mean proposal themes. Most win themes are really proposal themes that include feature and benefit statements with supporting proof points at the volume, section, subsection, and even paragraph levels. Proposal themes are much more specific than win themes. They usually appear as a highlighted first sentence (in a proposal volume or section) and serve as a mini summary of the subsequent narrative. At a minimum, well-written proposals have themes at the beginning of every volume, major section, subsection, and graphic action caption.

Volume themes are proposal themes that typically focus on technical, management, past performance, cost, or other main proposal topic areas. *Section themes* are themes that focus on topics within each volume (for example, management approach, key personnel, quality, and risk in the management volume). *Requirement themes* are themes focused on the most detailed requirements found in the RFP statement of work, performance work statement, or other detailed specification sections.

Why are Themes Important?

Proposal themes answer the evaluator's most important question: "Why should we select you?" Volume, section, and requirement themes support win themes by sending an explicit message to evaluators, a message repeated over and over in subtle and not so subtle ways throughout the proposal.

Well-written themes provide clear and convincing reasons for capturing the evaluators' attention and imagination. When those evaluators finish reading their assigned sections, the alignment of solution features with customer benefits and supporting proof points should leave no room for doubt, confusion, or skepticism. The bottom line—your proposal will be easier to evaluate and will tell a compelling story if it clearly articulated themes that score the most points.



Features and Benefits

The development of proposal features and benefits is a key part of solution development and the critical first step in developing proposal themes. Most proposal teams use established methods and templates including storyboards, module plans, work packages, or some other form of pre-draft deliverable to provide a process and structure for feature and benefit development.

However, despite providing proposal teams with what might appear to be clear feature and benefit definitions, directions, and examples, many writers and subject matter experts ignore these things completely or simply do not understand what is required. At best, features are listed as benefits (and vice versa), or worse, the features and benefits are so vague and generalized that they fail to achieve the desired result—to provide evaluators with compelling reasons to select your company.

Without clear, compelling features and benefits, what happens next is predictable. When time pressures force the team to start writing before themes are sufficiently developed, the entire proposal process begins to unravel. This results in a first draft that requires a complete rewrite. Understanding proposal themes—and the features and benefits that comprise them—is therefore a big step toward efficient and effective proposal development.

Features Highlight What is Important to You

Features are easier for proposal teams to identify because they are about their company's products or services. However, proposals can go on and on about such known features with little or no knowledge of the customer.

> "Understanding features and benefits is a big first step toward efficient and effective theme development."

One of the most vivid everyday example of a feature is the window sticker commonly displayed on a new car. Window stickers highlight the most important characteristics of the vehicle such as equipment (ABS brakes, air bags, traction control, OnStar); specifications (4 cylinders, 2-wheel drive); the EPA city/highway gas mileage; and the price.

A simple sticker saves consumers significant time and effort otherwise required to read the owner's manual or perform their own inspections/tests to determine how one car compares with others. Can you imagine having to drive the car on the highway and in the city while making detailed notes and calculations in order to calculate gas mileage?

The features you develop for your proposal serve the same basic function as the window sticker. Proposal features describing the characteristics of your solution include type of technology/tools, methodologies, processes, performance levels, key personnel, and a host of other management, technical, past performance, and cost characteristics.

Benefits Highlight What is Important to Your Customer

Whereas features are all about what is important to you (car window sticker), benefits are all about what is important to your customer.

Although features are important, most proposal teams forget that what customers really care about are benefits. Benefits are aspects or advantages of a feature that typically solve a customer problem in some way. For most proposals this means increased efficiency, reduced cost, reduced risk, higher performance levels (or some variant of these). The most effective benefits address specific evaluation criteria, customer problems, issues, and concerns in the RFP, or unwritten customer hot buttons that did not make it into the RFP.

Most car salespersons are generally good at sizing up customers as soon as they walk in the door, and at knowing which car features will best align with the customer's benefits to make the sale. A stereotypical example using a car dealership analogy best illustrates this point.

A well-dressed man drives into a Chevrolet showroom in a 10-year old Corvette. The salesperson spots him and immediately ponders a short-list of likely customer benefits (i.e., power, speed, design, sex appeal). In his mind, the salesperson starts linking features of the new Corvette models he has on the lot (horsepower, 0-60 mph statistics, vibrant colors, motor trend design award) to the benefits he thinks the customer wants. Sounds like a done deal, right?

But what if the salesperson knew that the man was a stay-at-home dad and was borrowing his friend's car to drive to the dealership? What if this stay-at-home dad wants safety, comfort, storage, and security? You can almost picture the salesperson's head begin to swirl as suddenly a new set of features (airbags, reinforced impact bars, OnStar, and adjustable seat belts) are required to address safety benefits that are quite different from the need for speed. The same stereotypical story could be told about a woman driving up to the dealership in a minivan looking for a new car. What if the woman was Danica Patrick, the famous NASCAR driver? Would the features of a new Chevy minivan be compelling to someone looking for horsepower, speed, and award-winning design?

Themes Link Benefits with Features to Communicate Solutions

Proposal professionals are not in the business of selling cars, but the underlying principals of features, benefits, and the relationship between these two is the same in our profession. The proposal theme provides the connection between what is impor-

tant to a customer (benefit) and what is important to you (feature). The proposal team's challenge is to devise an effective and efficient way to identify customer benefits (explicit and implicit), to link these benefits to quantifiable features, and to communicate compliant and compelling solutions to customers in a way that is easy to evaluate.

The Proof is in the Pudding

Great proposal themes highlight the important and relevant elements of your solution. They are found throughout proposals—most notably in theme statements, focus boxes, action captions, and feature/benefit tables.

Highlighting themes in high-profile locations is the most effective way to avoid a common mistake: burying important "golden nuggets" in proposal nooks and crannies where they are sure to be overlooked. Well-placed themes make it easier for the evaluator to find clear and compelling reasons to select your company, and they also eliminate the need to read the proposal from cover to cover (which most evaluators do not do anyway).

Use Proof to Substantiate Your Claims

Although theme placement is important, many proposal teams fail to develop compelling themes with sufficient proof points that support their claims in the first place. This typically happens for a number of reasons:

- Many writers do not know enough about their assigned topics and sections to develop proof points.
- The solutions have not evolved sufficiently to identify differentiators and proofs.
- The team relies too heavily on generic boilerplate previously used for other customer requirements and solutions (with no proof points).

The result is a proposal filled with marketing fluff and unsubstantiated claims. These are two of the most frequent deficiencies found in proposal reviews. They underscore the need for substantiating proof points that make thematic features and benefits credible.

To do their job, proposal evaluators need quantifiable proof points that support your claims and set you apart from the competition (discriminators). Such proof points can include empirical findings, past performance evaluations, customer surveys, testimonials, or industry ratings from independent advisory companies (like Gartner's Magic Quadrant analysis).

Proposal themes without sufficient proof points are risky, and can even jeopardize your ability to win. For example, overused catch phrases such as mission-critical, leading edge, and best-in-class become meaningless clichés and lose credibility with evaluators when not substantiated. Differentiators provide undeniable proof that demonstrates your understanding of the customer and your solutions to meet your customer's needs and wants.

Customer benefits and solution features alone are not sufficient to create winning proposal themes. Supporting proof points are essential: they provide evaluators with reasons to believe (and select) you.

Is the Proof Really in the Pudding?

When it comes to great proposal themes, it is important to remember that *the proof is in the pudding.* This well-known

> "Supporting proof points are essential—they provide evaluators with reasons to select you."

THEME 1:

- **Our technical approach includes automated coding software.** Most evaluators will view this theme as nothing more than a glorified re-statement of a basic requirement. At best, it is a lazy attempt at highlighting a generic feature (automated coding software). The more important elements (benefit and differentiating proof) required to score evaluation points are missing.
- **SCORE: RED (unacceptable)**

THEME 2:

- **Our EZ-Code™ software reduces time and cost.** This theme includes a specific feature (the name of the trademarked software) and a link between the feature and the associated benefits (reduced time and cost). However, most evaluators would agree that the benefits of reduced time and cost were probably the basis for the automated software requirement in the first place. Unless the amount of time and/or cost savings is specified, repeating these benefits is barely worth the effort.
- **SCORE: YELLOW (marginal)**

and commonly used proverb is a great metaphor for proposal themes and differentiators. Most of us have heard this phrase so many times, we believe we know what it means. But take a closer look. The literal translation of *the proof is in the pudding* does not make sense. The proverb has evolved over time from the original Don Quixote quote: "the proof of the pudding is in the eating" which means that you will not know whether food has been cooked properly until you try it. In proposal terms, evaluators will not believe your themes unless you use sufficient, quantifiable, and verifiable proof points (differentiators and substantiating metrics) to comply, persuade, and convince.

The Evolution of a Theme

The most effective themes include three simple components—benefits, features, and proof points.

The theme examples shown below of a DoJ automated coding software requirement helps to illustrate the power of compliant and compelling theme statements. This example is also used later in the article to describe a three-step theme development methodology. The example follows a technical proposal theme's evolutionary path, starting with a poorly written theme statement (Theme 1), and ending with a compelling and convincing theme statement (Theme 4). Theme 4 includes all the basic elements of a great theme—benefit, feature, and differentiating proof. Each evolutionary step includes a high-level analysis of the theme and the score (commonly used color scale) that the evaluators would likely assign.

Theme 4 summarizes the major benefits, features, and proof points of DoJ's automated software coding requirement, but it is only the beginning. It is up to each section's author of to make sure their narrative section following each theme includes sufficient benefit, feature, and proof detail to support that theme.

Proof Points Provide Customers with Reasons to Believe

A theme without proof points is like a court case without sufficient evidence. The result? The case is thrown out of court by the judge before the trial. Proof points provide a quantifiable way to substantiate your claims and give prospective customers tangible reasons to believe you are different (and better) than the competition. The strongest proof points are unique discriminators that you have vetted with your customer in advance. Ideally, these selling points are true for you and not true for at least one of your competitors. Be careful! Many companies do not really know what their competitors offer or rely on old (or incomplete) information. When you claim to have a unique approach (that really is not), you run the risk of losing significant customer credibility. If you have any doubts about the uniqueness of your approach, vet your solutions with the customer, or at least conduct some industry research to substantiate your claims.

The capture plan and other pursuit deliverables are designed to document and communicate customer hot buttons, selling points, and competitive information that is important for theme development. This information is essential if you truly want to stand out from the competition. If you do not have such information it will be extremely difficult to develop proposal themes that differentiate in a way that persuades evaluators to pick you.

THEME 3:

- **The intuitive graphical user interface of our EZ-Code™ software reduces staff training time by 75 percent to meet your service level agreements.** This theme is a significant improvement over Theme 2 and includes all of the required elements (feature, benefit, and differentiating proof). The feature is more specific (graphical user interface) and the potential differentiating proof (reduced staff training time) links to the specific evaluation criteria for meeting the customer-specified service level agreements. The metric (75 percent) quantifies the benefit to some degree, but it is does not constitute real proof since it is not clear whether training takes hours, days, weeks, or months.
- **SCORE: GREEN (acceptable)**

THEME 4:

- **Our EZ-Code™ software reduces staff training time from 4 hours to 1 hour with an intuitive graphical user interface implemented on 20 DoJ projects**. This theme puts all of the pieces together. The differentiator in Theme 3 (reduced staff training time by 75 percent) is refined and quantified in a more meaningful and practical way (75 percent is replaced with 4 hours to 1 hour). The proof (implemented on 20 DoJ projects) is a very compelling metric. Remember that the DoJ is the customer in the example. The benefit (reduced staff training) is re-positioned in front of the feature (intuitive graphical interface) to place more emphasis on what DoJ really cares about.
- **SCORE: BLUE (exceptional)**

A Method for the Madness

It seems ironic that a group of engineers from Hughes Aircraft (now Raytheon) formalized the concept of the proposal theme statement. These proposal pioneers were tired of a highly inefficient proposal development process, low win rates, and frustrated subject matter experts who were pressed into proposal writing duty. After some period of trial and error, they developed an appropriately named methodology, the Sequential Thematic Organization of Proposals (STOP) Methodology. When STOP was released as a formal company manual in 1965 and ushered in the standardized use of what is commonly referred to as storyboarding. The thesis statement, as defined in the STOP Methodology, provides some important historical context to a common challenge faced by proposal teams today:

"The Thesis Statement shows the reader at a glance the essential argument of the theme body…the reader is relieved of the common vexation: When will this passage end, and what point is the author driving at?"

The thesis statement, proposal outline, graphic concepts, and storyboard review sessions were the pillars of the STOP methodology. These four pillars helped solve some of the most perplexing challenges (and questions) faced by our proposal development forefathers:

- How could the individual contributions of dozens of authors be efficiently aligned?
- How could the proposal manager guard against unexpected surprises?
- How could each author be assured that he/she is not spinning his/her wheels?
- How could the strong points of the proposal be made glaringly clear to evaluators?

The thesis statement (we call it the theme statement today) summarized each topic's main strategic point and led the evaluator to mentally challenge the author to prove it. The idea worked. Proposal development time was dramatically reduced using the STOP approach. Subject matter experts were much more efficient. Win rates increased significantly. STOP was a success.

More than 40 years later, the theme statement and the other original storyboarding pillars have been repackaged and rebranded, but essentially remain the same. Modern-day storyboard equivalents such as the Proposal Development Worksheet (Shipley Associates), the Module Specification, Storymap, and Annotated Mock-Up (SM&A), the Content Plan (CapturePlanning), work packages, and other proposal planning documents are all descendants of the original STOP storyboard concept. These modern-day proposal development tools all have the four STOP pillars in one form or another, and all emphasize the importance of thinking about (and writing down) proposal themes *before* proposal writing begins. Failing to follow this simple STOP approach before you write causes teams to fall into a number of common proposal development traps, such as:

- Drafting proposal prose before themes are identified and vetted.
- Placing too much emphasis on the wrong features and benefits.
- Lacking a common vision and thematic threads throughout the proposal.
- Playing into the hands of your competition with a "me too" response.
- Writing throw-away proposal drafts that significantly waste writer and review time.

What can proposal teams do to avoid these common pitfalls? How can we stop the maddening situations caused by these development traps that ultimately result in inefficient and ineffective proposals?

The Recipe for Success

While there are a number of established ways to develop proposal themes and differentiators, the best recipes combine the same simple ingredients from similar sources (the RFP, the capture plan, and the collective intelligence of your capture and business development teams). These ingredients are:

- 2 ounces of proposal evaluation criteria
- 1 ounce of proposal instructions

> "The recipe for theme development includes a few simple ingredients from the RFP and the capture plan."

- 1 scoop of solutions (for each proposal volume)
- 2 dashes of customer hot buttons
- A pinch of competitive intelligence

Exact measurements may vary depending on the type and quality of the RFP.

Use a Method…Any Method

Although the proposal theme recipe sounds simple, most proposal themes end up being…well…half-baked. The problem is that many proposal teams fail to invest the appropriate time and resources needed to develop proposal solutions and themes. Many proposal teams bolt for the boilerplate and forget about themes altogether—hoping that they will miraculously emerge in the Executive Summary the night before the proposal is due. The result is something that looks like this:

> Our Company Name (Acronym) is pleased to respond to this <long project name> (Acronym) for <long customer name> (Acronym). More about us...Blah, blah X,XXX employees and $XX million in revenues in 2012. Aren't we great and special .....blah blah blah.
>
> Blah blah, blah blah, this is a mission critical project. Blah blah we are a best-in-class, blah blah. Our technical solutions are leading edge blah blah. We have assembled a best-of-breed "A-Team", blah, blah, blah.
>
> Blah blah blah <your vague or generalized statement here>. Blah blah, blah blah, blah blah, no transition risk.
>
> Our technical approach includes autocoding software blah blah blah.

There are scores of proposal development methodologies that include some form of theme development process. I recommend a simple three-step process that starts with the RFP and applies basic capture information including customer hot buttons and competitive intelligence. This theme development approach is designed for simplicity and is easily executed by business developers, proposal managers, and proposal writers. A more detailed 10-step win theme development approach designed for engineers is described by Michele Rochon in "Engineering a Win Theme: A Scalable Proposal Method for Technical Sales Environments", *The Journal of the Association of Proposal Management Professionals*, Spring/Summer 2010.

Example: A DoJ request for proposal and capture plan contains the following information:

- **Detailed Requirement (Section C):** "Shall provide an automated tool for software development."
- **Instructions (Section L):** "Shall describe the tool and how it saves time and reduces cost."
- **Evaluation Criteria (Section M):** "Ability to meet or exceed service level agreements." "The lowest risk scores the most points."
- **Customer Hot Buttons:** Proven software is key, especially on other DoJ projects. An easy to use intuitive graphical user interface is a must.
- **Competitive Intelligence:** The incumbent contractor failed miserably in training DoJ programmers to use the tool effectively and efficiently.

Step 1: Use a simple three-column table to identify major customer benefits (column 1) and your related solution features (column 2). Keep it simple by starting with 3-4 major customer benefits and 1-2 solution features for each benefit.

Step 2: Once the high-level features and benefits are developed, list the proof points (column 3) for each feature. Be creative and define as many proof points for each feature as you can using

Customer Benefits	Solution Features	Proof Points
Saved Time and Reduced Cost	• Proven EZ-Code™ software	• Successfully installed at DoJ ("Outstanding" Past Performance ratings)
Reduced Risk	• Reduced staff training time • Successfully implemented at DoJ	• Reduced average training time from 4 hours to 1 hour • 20 relevant projects in last three years
Increased User Acceptance	• Intuitive GUI • Reduced staff training time	• Rated #1 for Usability *(Information Week, 2012)*

"Many companies fail to standardize their theme development processes or lack sufficient resources to follow those processes efficiently and effectively."

quantifiable metrics. A good starting point is a total of 4-6 proof points for each theme. Use the capture plan as the basis for integrating customer hot buttons and competitive information into the process to create powerful differentiators that truly discriminate.

Step 3: Use a proposal theme template that highlights the theme statement (feature and benefit) using color, bolding, italics, or a combination of these to make the theme statement stand out. Pair up the supporting proof points in a focus box with each theme statement, as shown in the example to the right.

We Reduce Training Time and Costs with Our Proven Autocoding Software

- EZ-Code™ software rated #1 for best value and usability (Information Week, 2012)
- 75% reduction on instaff training time (from 4 hours to 1 hour)
- intuitive graphical user interface implemented promotes user acceptance
- Successfully implemented in 20 DoJ projects in the last 3 years
- Rated "Outstanding" by DoJ by all three past performacne referneces

Our EZ-Code™ auto-coding software reduces staff training time from 4 hours to 1 hour with an intuitive graphical user interface implemented on 20 DoJ projects.

Incorporate theme statements and focus boxes into the storyboard, module plan, content plan, or whatever pre-proposal planning deliverable you use. Develop a complete and sufficiently detailed compliant outline with proposal themes for each major section. Sketch out graphics concepts to illustrate the major features, benefits, and proof points that are consistent with your theme statements, using graphic action captions to re-iterate the themes. Review the themes, outline, graphics, and action captions with your management team for validation, enhancement, and approval. Then, and only then, are you ready to start writing.

Win More and Work Less?

This article began with the definition of proposal themes and a description of the benefits of proposal theme development. We looked at the primary components of winning proposal themes (features, benefits, and proof). We described how to get the most

out of proposal themes by providing discriminating proof points to set you apart from the competition. We tied all the concepts together in a recipe for success—a proven methodology for developing winning proposal themes.

It all sounds pretty simple, right? Then why do many organizations continue to fail to apply these concepts consistently?

Theme Development Challenges

Most companies have established proposal processes that include some form of proposal theme development. However, many companies fail to either standardize these processes or lack the sufficient resources to follow them efficiently and effectively.

Unless the capture or proposal manager tackles the theme development task alone (not recommended), some type of working sessions are required to:

- Identify the requisite feature, benefit, and proof point input.
- Develop standardized theme statements and supporting focus boxes from this input.
- Review, refine, enhance, and finalize theme statements and focus boxes.

However, getting the right people in the same room to discuss proposal themes, features, benefits, proof, and differentiators requires significant planning and meticulous execution. Without the appropriate focus, a common understanding of terms, and the right meeting facilitator, theme development working sessions can be a monumental flop.

Tips for Working Less and Winning More

Winning proposals start with compelling and compliant proposal themes that can make the difference between winning and losing your next bid. Here are a few concluding tips to help you work less on your next winning proposal.

- Insist on some level of up-front planning to develop compliant and compelling proposal themes
- Use an established methodology and theme development process to identify customer benefits, related solution features, and differentiating proof points
- Review the resulting theme statements and focus boxes with your management team before you begin writing the proposal
- Seek external consulting support if you need help.

What are your thoughts and tips on creating great proposal themes? Do you disagree with any of my suggestions? What recommendations resonate with you the most? We can continue the dialogue one-on-one, on a LinkedIn discussion, or at the next APMP event. Contact Chris at chris@rainmakerz.biz or 202-255-2355.

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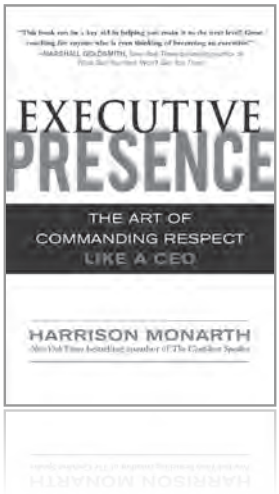
Chris Simmons is a thought leader, public speaker, published author, and the founder and principal member of Rainmakerz Consulting—a business development company. He is the former vice president of the APMP National Capital Area chapter and regular contributor to APMP publications, presentations, and educational events. Chris was nominated for the Top 25 Consultants award (*Consulting Magazine*) in 2012.



Executive Presence: The Art of Commanding Respect Like a CEO

Harrison Monarth

McGraw-Hill; 2009

$24.95

by: **Ali Paskun, APMP, PPF.APMP**

Our job as proposal professionals is to use communication—words and graphics—to best present our solution in ways that influence the customer to choose us. We use features and benefits tables to demonstrate that our solution offers the best value. Risk discussions outline the methods we will use to ensure the customer does not face the negative concerns our competitors' proposals ensure. Discriminators highlight what we offer that the competition cannot. Developing a win strategy is critical to winning; communicating that strategy in the proposal gets the win.

So, what does a book titled *Executive Presence: The Art of Commanding Respect Like a CEO* have to do with proposal communication? As I found by reading this book, the answer is "a lot." Much in this book is directly applicable to the skills needed to succeed in the proposal industry.

Harrison Monarth's goal is to help the reader develop "executive presence," influencing people's perceptions by using a combination of superior communication skills and an ability to accurately read people. Whether we realize it or not, we use executive presence in our proposals. Do we not take the hot buttons and customer needs that business developers and capture managers have gleaned from verbal and non-verbal cues, and use that information to influence the customer's perceptions of our company, our proposed solution, and those of our competitors? As part of the sales process, do we not sell ideas and answers to solve the wants and needs of our customers through the proposals we craft? How well our proposals succeed depends on how our sales pitch is perceived by the customer.

For example, Monarth discusses how customers can use filters to distort the message we want them to take away. According to the discipline of neuro-linguistic programming, these filters are:

- Meta programs: The way people's minds work.
- Belief systems: The individual's visions of the world
- Values: What people believe is good or bad, right or wrong.
- Memories: The events and learning experiences that shaped a person's life
- Past decisions: The information a person gained via the results of his/her choices

How easy would it be to develop a past performance or corporate experience write up, provide elements of a risk mitigation plan, or even identify potential team members if we understood how our messages are being passed through any of these filters? *Executive Presence: The Art of Commanding Respect Like a CEO* provides this understanding.

> *"Whether we realize it or not, we use executive presence in our proposals."*

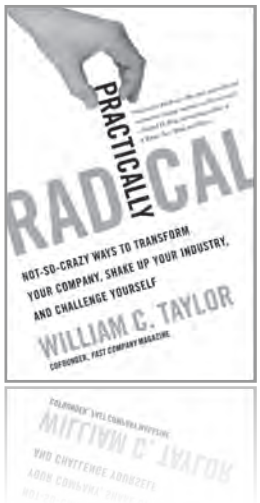
> *"The chapters I found most interesting were: Engineering Buy-in and Gaining Compliance, and Master the Art of Storytelling for Personal and Professional Success."*

As a proposal professional, the chapters I found most interesting were Chapter 4: Engineering Buy-in and Gaining Compliance, and Chapter 5: Master the Art of Storytelling for Personal and Professional Success. It is a standard part of our capture and win strategies to understand how to achieve customer buy-in of our solutions, and Chapter 4 discusses how to get and keep someone's attention (vital for reaching an evaluator who must read all submitted proposals without falling asleep) and how people make decisions. Chapter 5 includes sections that describe why people are influenced by stories and how to engage a person's emotions throughout a story (or, as we put it, "hitting their hot buttons").

Other applicable areas discussed in the book include building relationships, persuading without manipulating, and predicting behavior. Although Monarth set out to write a book geared towards professionals who are not specifically in the proposal development field, there is much in the book we can apply to our careers. His discussions of personal branding, social and emotional intelligence, reputation management, interpersonal communication, and social media are particularly applicable.

I have always had an interest in language and communication, specifically how words are used to influence decisions and behavior. This interest is one reason why I enjoy applying my communications background to the proposal industry's strategic and tactical aspects. It is also why I enjoy managing a proposal center; mentoring junior staff members, and sharing my war stories of past proposals. These things enable me to teach others how to present ideas that contribute to a win. In *Executive Presence: The Art of Commanding Respect Like a CEO* I found a resource that encompasses all these strategic and tactical areas.

Ali Paskun, AF.APMP has nearly 30 years' experience in the proposal industry. Currently, she is Director, Proposal Operations in the Intelligence, Surveillance, and Reconnaissance (ISR) Group for CSC. In this position, she manages, trains, and mentors a staff of professionals who support proposal activities across ISR Group. An active APMP member since 1999, Ali is an APMP Fellow and is accredited at the Foundation Level. She is the Managing Editor of the *Journal of the Association of Proposal Management Professionals* and the *Perspective*. Ali is the Chapter Chair for the Chesapeake Chapter, which serves the Central Maryland area. She has a BS in Communications from the University of Maryland, University College.



Practically Radical: Not-So-Crazy Ways to Transform Your Company, Shake Up Your Industry, and Challenge Yourself

17 Mistakes that Broadcast Hidden Negative Messages Which Dramatically Decrease Your Federal Contract WIN Probability

William C. Taylor

New York: HarperCollins, 2011

$15.99 (Paperback)

by: **Amy McGeady, Ph.D., APMP, PPF.APMP**

Bill Taylor's *Practically Radical* is intended as a change guide for leaders. Taylor is best known as one of the co-founders of *Fast Company* magazine, author of *Mavericks at Work*, and regular contributor to *The New York Times* and *Harvard Business Review*. He challenges conventional thinking about business. In *Practically Radical*, Taylor urges leaders to stop focusing on out-competing their rivals and concentrate on uncovering innovative ideas and strategies that redefine the terms of competition. This book encourages creativity and offers strategies for invigorating organizations, launching new initiatives, and rethinking leadership.

Taylor divides *Practically Radical* into three distinct sections geared towards three different audiences. Part 1 focuses on strategies for transforming existing companies and organizations. Part 2 is geared towards readers who want to launch something new, either a new organization or a new focus within an established organization. Part 3 hopes to redefine leadership, explaining that the most successful leaders have a unique combination of ambition, humility, and the ability to recognize powerful ideas.

The book explores 25 companies whose leaders used some combination of innovation, passion, customer-focus, and vision to successfully affect change. Initially, I was turned off by this zealous use of case studies. As I read further, I was surprised by how much I enjoyed learning about how leaders within familiar organizations pursued innovation and took actions, many risky, to energize their employees, provide value to their customers, and create brand cohesion through steadfastness to organizational mission. By following these principles, the leaders profiled distinguished themselves and carved out unique space within their markets.

One of my favorite parts of the book is the idea of looking within to find seeds of innovation and growth potential. In Chapter 1, What You See Shapes How You Change—The Virtues of Vuja Dé, Taylor profiles four distinct entities—the Providence Rhode Island Police Department, Pedigree Dog Food, Swiss Corporation for Microelectronics and Watchmaking (SMH), and Girl Scouts USA—to present a compelling case for revisiting a company's history when trying to shape its future. He chronicles organizations that reclaimed market leadership not by analyzing their competitors and outsmarting them, but by reexamining their own history and what had made them great in the first place. In describing SMH's leader Nicolas G. Hayek, Taylor states, "he realized that the way to devise a game plan for the future was to draw on the compelling ideas around which the organization first took shape—ideas that had gotten lost through decades of uninspired leadership, me-too growth strategies, and deadening bureaucratic practices."

After reading the book in its entirety, I kept coming back to this idea and questioning its relevance to the proposal profession. Over the years, I have worked with teams that struggled diligently to describe "discriminators" for ideas, products, and services that truly were indistinguishable from the competition. For these efforts, theme statements, attempting to be value propositions, came across as "me-too" statements that may have been as good as, but no better than, the competition.

Without ever mentioning the idea of win themes, Taylor's work touches on the key distinction between good ones and bad ones. Bad win themes focus on the products or services we sell. Good win themes focus on the benefits we deliver. A case study on Pedigree dog food, of all things, illustrates this point. In a hyper-competitive marketplace, company leaders opted to stop focusing on their product—crunchier dog food at lower prices—to concentrate on why they were in business—a love of dogs. By getting back to the "soul" of the company, leaders reinvigorated the brand and attracted customer interest and loyalty. As proposal professionals, perhaps our most inspired work comes when we focus on the "soul" of our offerings, rather than pushing the products and services we are trying to sell.

In Chapter 3, Practically Radical (I)—Five Truths of Corporate Transformation, Taylor states, "Sometimes, the most rewarding path to the future is built on a return to first principles." In a profession plagued by burn out, long hours, and unreasonable expectations, there are still

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plenty of us who love the crazy, hectic, exhilarating world of proposals. Many, if not most, of us were not drawn to the proposal profession out of a yearning to sell a specific company's services or products. It is not what we sell that interests us, though we do develop a fondness for specific offerings. It is the creativity, collaboration, and intensity that hook us. It is easy to lose sight of this when our workload grows too large or we are stuck trying to package "me-too" ideas as one-of-a-kind.

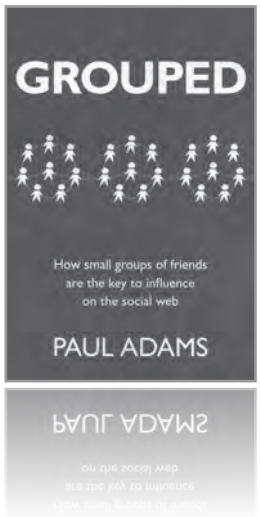
What would happen, though, if we set these things aside, and worked purposely to reclaim the aspects of proposal work that originally drew us to this profession? My guess is that we would bring renewed energy and enthusiasm that would spill onto others, and instigate some of the radical shifts Taylor anticipates.

The book describes good leaders, individuals and organizations, not by their ability to stand out among the competition but to hold on to that unique spark that attracts customers and employees to them. He urges readers to, "Forget the question, What keeps you up at night? The bigger question is, What gets you up in the morning?" Taylor argues that with a strong sense of identity and purpose, individuals and organizations bring out the best in others and ascend as leaders in their industries.

Taylor is an engaging writer offering interesting ideas on organizational change and leadership transformation. This book is written much in the style of *Fast Company*, geared towards the same executives and entrepreneurs who have become his passionate followers for more than 15 years. Like many works in this genre, the writing reads much like "new business" evangelism. Readers wanting a conventional change management guide will be disappointed.

> *"The book describes good leaders, individuals and organizations, not by their ability to stand out among the competition but to hold on to that unique spark that attracts customers and employees to them."*

Amy McGeady currently serves as APMP's Chief Executive Officer and is an APMP Fellow. She is also the Vice President of Professional Services at Privia LLC. She can be reached at amcgeady@privia.com.



Grouped: How Small Groups of Friends are the Key to Influence on the Social Web

Paul Adams

New Riders, 2012

$29.99

by: **Jim Hiles**

I purchased *Grouped* by Paul Adams at the Bid & Proposal Conference 2012. It was arranged with several other titles in a genre mash-up of networking, social media, and marketing/communications books. *Grouped* turned out to be a short and concise book, one built around a central idea that is a challenge to conventional wisdom.

The conventional wisdom is that society has very influential people who are necessary for ideas to spread. The author's counter-position is that the way information actually spreads through a large population is through many regular people just like you and me. Social networks should be recognized as connected independent groups of friends. Thus, if your goal is to spread information (e.g., about a product or service), it is better to design for, and target messages at, many small groups of friends rather than look for overly influential individuals. The sub-title of *Grouped* accurately reflects this primary message: understanding networks of small groups of friends are the key to influence on the social web.

Paul Adams' stated goal for *Grouped* is to provide a foundational understanding of social behavior and how it applies to the future of business. To his target audience of busy professionals, he offers a synthesis of key studies in related fields germane to his chosen topic, and summarizes these studies into "actionable patterns." While I learned from this book and found the content and presentation both engaging and interesting, these direct and immediately applicable "actionable patterns" eluded me.

In his introduction, the author includes a 'how to' on the use of the section on actionable patterns. This section identifies when one should reach for *Grouped* whenever you are creating your next product, marketing plan, or advertising. In the conclusion, the author provides a call to action directed at anyone involved in building and selling products—"designers, marketers, developers and advertisers." The author links this combination of actors to new companies "we have not yet heard of" that will dramatically change entire business sectors as they are built and grow "around people" and social networks.

Grouped may be highly relevant to this audience, and also to others who seek an improved understanding of social behavior, networks, and how people think…especially those people who are a part of web companies centered on people and their social interactions.

There are 10 chapters in *Grouped*, none longer than 20 pages. A detailed index contains both names and topical entries. The chapters are crisp and the writing style is not verbose. Each chapter ends with a list for further reading that points to the sources used. I found that these further reading sections include interesting and relevant content that supported and gave credibility to the author's claims without excessive formality or academic prose.

While *Grouped* does include references to some excellent materials on social and network theories and research, it is a summary book and does not appear to add anything new to this body of cited work. A quick trip through the author's website, www.thinkoutsidein.com did not help allay the niggling doubt I had, that the presented materials were catchy and the inclusion of interesting references were somewhat ornamental. This characterization accurately describes the "thinkoutsidein" content, nifty pictures with hip comments but no depth, and lack of evidence for the disciplined research into social behavior and networks hinted at by the book.

Chapter 4, on how our relationships influence us, included a segment that generated a useful reflection for me. This chapter included a section that dissected the different types of relationships we have, categorizing them into eight types and as weak or strong ties. The types of relationships categorized as weak ties included associates, useful contacts, fun friends, favor friends, and helpmates. Strong tie relationships include comforters, confidants, and soulmates.

I purchased my copy of *Grouped* after I had solidified a previously virtual acquaintanceship with someone into what we now call dear old friends as a salute to our connection, which transcends the relative length of our friendship. As I read this chapter, I reflected on the rush of this newly kindled relationship and contrasted it with the potential that I feel exists, untapped for the most part, among my many LinkedIn connections. The author stepped through these types of relationships in a series of pictures, making multiple points about the amount of communication and influence that we all have with the weak and strong ties in our networks, and how much influ-

> *"Paul Adams' stated goal for Grouped is to provide a foundational understanding of social behavior and how it applies to the future of business."*

ence either type of relationship has on the participants. An interesting point in the book is that while we look to our strong ties first for opinions and information, chances are that the weak ties in our networks have more knowledge on the topic. Thus, turning first to my dear old friends for opinions and advice might mean that I am ignoring more knowledgeable input from the weak ties of my LinkedIn connections.

Paul Adams' career has centered on the user-experience field. He has led research teams on social behavior and technology for Facebook, Google, Gmail, YouTube, and others. This experience base in newly evolving areas provides an undertone in *Grouped* that makes it difficult for readers working in traditional industries and providing traditional products and services to easily relate the concepts and ideas described in *Grouped* to their work. This is not to imply that those ideas and concepts are not relevant outside the world of a web 3.0 company, just that there is a definite feel in the types of references and examples cited that may not easily resonate with outsiders to this industry segment.

For business developers in any field or industry segment, there is still much here to think about and apply. Accepting that information flows and is spread by connected independent groups of friends rather than fewer influential individuals means that understanding the structure of a network in which ideas are seeded is more important than understanding whether specific individuals have a high degree of influence. A related "quick tip" in the book is to target large numbers of regular people, who are likely to be interested in what your business has to say, rather than a few influencers. You may not necessarily know them by name, but in the current web social environment, you can determine that they have the right attributes to be interested in your message. Setting off "many small cascades" in this manner averages out the random factor and is more likely to produce positive results.

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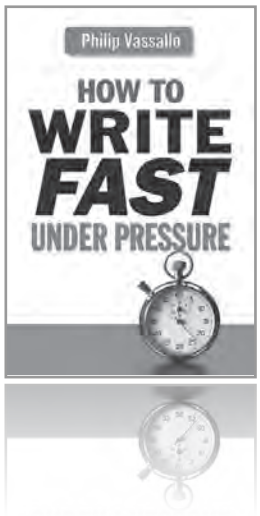
Jim Hiles is an avid consumer of business development-related books and materials. He is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the Federal Government. Jim manages Public Sector Business Development for the MorganFranklin Corporation and is The APMP *Journal* Book Review Editor.



How to Write Fast Under Pressure

Philip Vassallo

American Management Association, 2010

$17.99

by: **Jim Hiles**

Phillip Vassallo, an active consultant, speaker, and trainer, has seven books to his credit, two specifically on writing. In *How to Write Fast Under Pressure* he addresses all who write as part of their work. Does this mean all of us confronted with writing proposal sections or longer manuscripts? Yes, but his intention is to speak to all who write for a living when they "request, respond, report, explain, analyze, evaluate, justify, troubleshoot, summarize or propose." These are universal activities performed by a large number of people, many of whom would not explicitly state that what they do is "write for a living."

The author dismisses the idea that writing fast is about keyboarding skills or words-per-minute typing speed. I liked this, and I especially identified with the author's description of work-related writing situations. Such situations are characterized by competing demands, constant interruption, imperatives for writing collaboratively, and writing environments that resemble anything other than a quiet and conducive safe zone for thought generation. The author's central thesis is that writing to deadline in such ever-present distracting environments requires us to have a (writing) plan, techniques to execute the plan quickly, the resolve to see it through, and the endurance to do it repeatedly.

This central thesis is captured in the acronym DASH. Hitting the ground running with the end in mind is the "D" for "direction." Moving quickly through any writing assignment is the "A" for "acceleration." Possessing the stamina to get the writing job done is the "S" for "strength." Finally, maintaining productivity throughout your writing life is the "H" for "health." The book devotes a chapter each of these DASH elements. Along the way, the reader learns "Three Big Questions" to clarify the direction of a writing project, and "common energy stoppers" that frequently interrupt a writer's flow and how to mitigate or overcome them.

The development of this central thesis and its numerous supporting and illuminating elements are logically and methodically presented. The book is primarily based on the author's many years of experience helping others write. The reader is not left doubting that this experience base is on target, primarily because of the rich and engaging content that flows steadily throughout the book.

Early on Vassallo introduces the reader to Mopey Moe and Speedy Didi, two central characters who appear as exemplars of polar ends of the attitude towards, and behaviors associated with, consistently writing fast. Exchanges between Mopey Moe and Speedy Didi are artfully woven throughout the book, and the various types of writer's identities they represent should be immediately recognizable to those of us who spend time on proposals and with the many types of writing personalities we encounter in our daily work (including our own). Detailed scenarios and helpful solutions are provided for each type of writing personality. These help apply effective and fast writing to overcome energy sappers and move

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quickly past roadblocks to their professional success.

I found useful guidance near the end of the volume, in the concluding dialogue between Didi and Moe about the 5-, 10-, and 20-minute fixes. These fixes build on each other. The first and shortest "fix" is focused on purposefulness and completeness; it reminds the writer to assert the purpose in the opening sentence, separate the purpose from the rest of the document, check the closing for logical next steps, and review the supporting details. This and the other fixes can be used alone or in combination, depending on how much time one has to spend editing.

The author closes with a well-written section on keeping a fresh approach. For this reader, however, the section was flowery and a little off-target. I would have preferred the book to end with the summary provided by the author.

On his web page (www.philvassallo.com) the author states that the book is based on "results from years of teaching people in the corporate world, as well as on the undergraduate and graduate levels, to write successfully on deadline." It is chock full of sensible reflections and useful tips on dealing with the daily grind of writing for multiple projects with varied purposes and readers." His prolific and informative blog posts can be found in his "Words on the line" blog at http://wordsontheline.blogspot.com/. In contrast to *How to Write Fast Under Pressure*, the words on the line blog have a lot of grammar-centric content. *How to Write Fast Under Pressure* does not address grammar nits to anywhere near this level of detail, for which this reader was grateful.

Overall, *How to Write Fast Under Pressure* motivated and inspired me to overcome some of my own poor writing habits, and provided useful tips and tools to better perform the primary means of communication used in my work.

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Hope is Not a Winning Strategy... But Price to Win (PTW) Is!

Anthony C. Constable
Avenue Design, Inc. 2011
$223.13

by: **Jim Hiles**

Tony Constable came to the US from the United Kingdom in 1968 as a computer programmer and worked in this capacity for a number of firms. While developing technical solutions for major defense contractors, he came to the realization that good technical solutions could only win if they were supported by competent management approaches. Tony's pursuit of excellence in management approaches in turn resulted in his devout attention to the "final frontier for capture success"—pricing, which he has been a student of since the 1970s. Tony is a humble man who maintains his youthful accent and energy. His reference to himself as a student of pricing and price to win is an incredible understatement. *Hope is Not a Winning Strategy* is a brilliant articulation of his life's work and philosophies, and at no point does Tony disappoint with this publication.

Hope is Not a Winning Strategy is not a book for beginners to the world of new business capture and proposals. This book is written for advanced practitioners in the pursuit, capture, and pricing of proposals to the Federal Government. As a matter of full disclosure, I must admit that I was thrilled to see that in 2011 the author had published this work. I had attended a full day price-to-win workshop led by Tony approximately five years ago. I have diligently worked to price winning proposals and apply his principles. I felt that I knew the main players and methods in this relatively small and somewhat closely held domain, and held the author's disciplined and thoughtful approaches in high regard. When I asked him why he published this volume, he stated that in the approximately seven years that he has been doing the seminar, he has probably reached three or four thousand people. By publishing in a book format, it is Tony's, (the price-to-win evangelist) hope that perhaps the number of people enlightened by the ideas in *Hope is Not a Winning Strategy* can be increased by a factor of ten. I hope he is right and achieves this worthy goal.

The primary sources for *Hope is Not a Winning Strategy* are the numerous and varied experiences of the author, those who have worked in and with his firm, and the interactions in the many seminars he has conducted on this subject. The writing style, motivations, and methodologies are all made very clear, starting with Tony's three-phase, ten-step price to win framework. This framework provides capture teams with a detailed definition of their competition, an explanation of how the competitors are most likely to approach acquisition of business opportunities, and a well-supported assessment of

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where the competitors are likely to price their offerings.

The layout of *Hope is Not a Winning Strategy* is logical and orderly. All terms are clearly defined. There are numerous detailed and clearly labeled graphics that are genuinely helpful in enhancing reader understanding of key concepts. A complete index is included, along with a glossary of terms. The layout of the book and a "how to use this book" section are helpful tools to obtain maximum utility from this volume. The last section is a detailed, 20-page exercise that takes the reader step-by-step through application of the 3-phase, 10-step model to a hypothetical opportunity. Completed pricing tables are included, rounding out everything needed to run multiple pricing scenarios against the hypothetical opportunity and compare application and results to the "textbook answer."

One of the high points of *Hope is Not a Winning Strategy* is the number of original and key concepts that are fully explored and explained. One of these key concepts is price as an independent variable, where a price to win is developed and held as an independent variable (as opposed to the more common practice of price being produced as a dependent variable) with the focus of the capture team's effort being placed on how to deliver the solution at the predetermined price to win.

Another key conceptual frame put forth is a price to win maturity model. The model has four maturity levels, which are explained in detail. True to the level of detail and integration of the other concepts presented, the price-to-win maturity model is presented in a manner that makes it clear to readers how to self-assess where their own pricing practices are against the levels in the model, and how to implement and use the price-to-win concepts in the book to increase their own level of price to win maturity. To the best of this reviewer's knowledge, there are no competing or alternative frameworks of this sort dedicated to categorizing and assessing price to win maturity. This maturity model represents a significant and noteworthy contribution to the field of pricing.

The writing style used is entertaining and lively, with liberally used allegories, metaphors, and tongue-in-cheek humorous anecdotes, such as the author's use of "catch 'ems" and "skin 'ems" to refer to two types of groups in firms, or the note calling for price to winners to remind capture teams that their purpose in life is not to borrow the capture team's watch to tell them what time it is.

Hope is Not a Winning Strategy is a welcome addition to the small body of literature available on pricing for the government contracting market, and has a considerable amount of insight and practical guidance for solution and pricing developers in other markets. The author's objectives have been amply met with publication of this important work, making *Hope is Not a Winning Strategy* a must-read for capture managers, business developers, and others involved in pricing to win.

Jim Hiles is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the Federal Government. Jim manages Public Sector Business Development for the MorganFranklin Corporation, serves as The APMP *Journal* Book Review Editor, and was Co-Chair of APMP's Bid & Proposal Con 2012.

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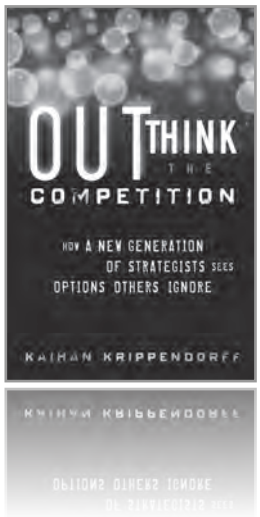

Outthink the Competition: How a New Generation of Strategists Sees Options Others Ignore

Kaihan Krippendorf

Wiley & Sons, 2012

$15.89

by: **Jim Hiles**

Kaihan Krippendorf lays out a playbook in *Outthink the Competition* on how to face the disruption that is occurring in the business world. The author, who already has three well-received business books to his credit, starts his fourth title by breaking down all those in business as either thinkers or outthinkers. Thinkers are those who operate in a pattern: they have adopted a set way of doing things, even in the face of revolutionary change. Outthinkers don't do this; they question what others have accepted and find new (superior) strategies. The author is clearly speaking to all of us thinkers, issuing a clarion call to become outthinkers, to question the status quo, and to redefine our markets, including the services we provide and how we provide them.

Like many business strategists, the author bases his approach on a foundation established by early warriors-strategists such as Ghenghis Kahn, Sun Tzu, Machiavelli, and the much more recent John Boyd. He expands this foundation to provide the advice offered in *Outthink the Competition*, an expansion I really appreciated.

The author describes how he analyzed more than 9,000 companies' performance between 1990-2002, examining their revenue growth, shareholder return, profit margin, and other metrics. This analysis identified the 100 most competitive companies of that period. He then analyzed those companies' "playbooks" to identify the strategies they used to beat their competition in the marketplace. After reapplying their analysis during the 2000s, they concluded that a major shift occurred around 2004. The nature of competition in the post-2004 marketplace is characterized by shortened product life-cycles, outsourcing that has restructured entire business sectors, social media and real-time marketing that is becoming mainstream, and competitors who are crossing industry borders faster.

During the earlier 1990-2002 study, the author and his colleagues trained business executives and entrepreneurs to understand and apply the top 100 companies' successful strategies. The more recent study conducted primary research with leadership at the top 16 firms identified. In the more recent study the author returned to the warrior-strategists. He

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also included an "ancient Chinese text" referred to as "the 36 stratagems." A web search using this term quickly reveals their interesting history and complete listing. In an appendix, the author provides a table with his interpretation of each stratagem. Each interpretation includes a modern and an "original" version of the stratagem, a thought-question, and a business example.

The contents of the book are crisply organized and presented in five main sections: 1) the foundation, 2) the "new" outthinker playbook, 3) the five habits of outthinkers, 4) applying the outthinker process, and 5) rebuilding the organization from within. It was easy to see how the author's advice provided in each section is applicable to current business challenges. The writing style is blunt but not jarring, and provides many examples taken directly from the most highly competitive firms identified through the author's studies. For instance, in "frame shifting" (one of the five habits of outthinkers), specific examples are provided of how Urban Outfitters' different frame of reference than its industry peers resulted in its successful strategies, which included selling exclusively to college students (while competitors continued to sell to a broader consumer base) and decentralizing store operations to give each store a different look. These types of very specific examples helped me understand the author's meaning and intended application of concepts such as "frame shifting."

While the chapters and examples were well organized and easy to digest, they also followed a recognizable script that at times did not make a positive connection with this reviewer. I felt I had seen this type of script before, particularly in business strategy books, and it brought to mind the less flattering connotations of name-dropping and over-reliance on extreme examples. To understand what I mean by this, picture a storyboard for each chapter that consists of these fill-in-the-blanks: edgy title for section where the meaning is not immediately recognizable, pithy quote from long-dead battlefield strategist, anecdote about choice made with kids or short list of attributes of edgy title, inserted name of one Fortune 50 company, brief description of something that company did, and conclusion that reinforces rah-rah statements about how great strategists (outthinkers) use the presented concept.

This aside, I found the author to be better than average in his presentation, and I attribute that in part to his freely sharing the basis for his conclusions and advice, and the high level of detail he includes in the appendices. *Outthink the Competition* comes complete with a detailed index and footnotes for each chapter. An appendix with tools to apply the outthinker concepts is also included, with a link to the author's web site to retrieve refreshed versions. This very current website (www.kaihan.net) offers a number of tools and other interactive content.

Outthink the Competition was an enjoyable and informative read. The content was provocative and I came away feeling that I had learned actionable business strategies, such as how to engage competitors on two fronts simultaneously to force competitive choices. The ideas in this book are completely relevant to proposal management and business development professionals, particularly as they develop solution and delivery strategies, win themes, and points of differentiation from their competitors.

Jim Hiles is an avid consumer of business development-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. Jim manages Public Sector Business Development for the MorganFranklin Corporation and is The APMP *Journal* Book Review Editor.

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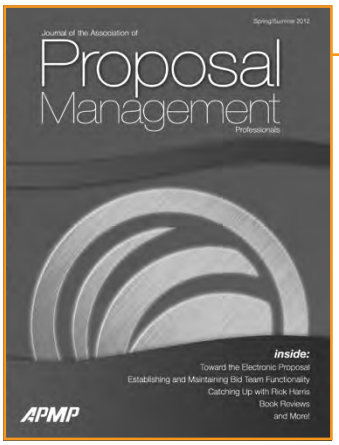

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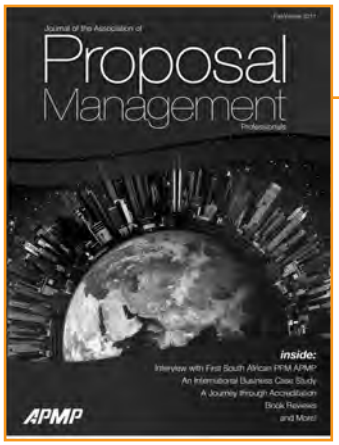

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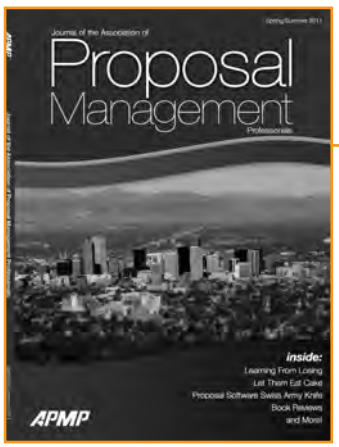

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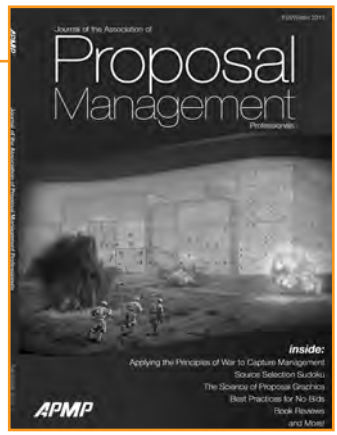

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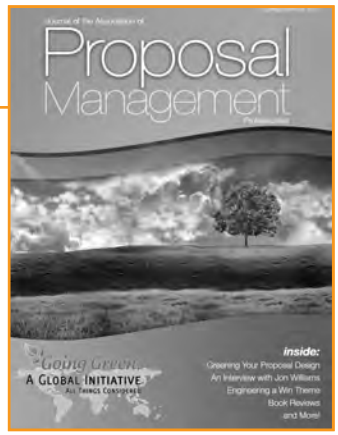

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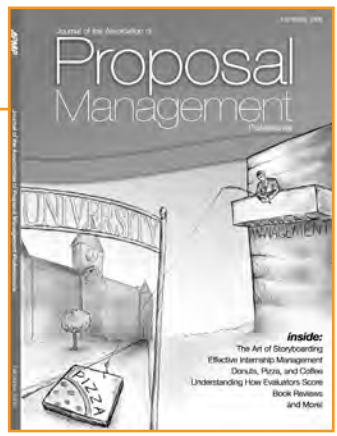

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