journal
APMP
Your Professional Guide to Winning Business

FALL + WINTER // 2013

+

GETTING RESPECT

WINNING MORE AWARDS

THE TRUST EQUATION

THE ORGANIZED TOOLKIT

CONFESSIONS OF A FLEXIBLE OCD

WHAT

ARE THE REASONS PROPOSALS DON'T WIN?

ARE COMMON TRAITS OF PROPOSALS THAT FAIL?

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FROM APMP'S
EXECUTIVE DIRECTOR

THE BRITISH ARE COMING!

The word "international" is one of those expressions that gets tossed around, discarded, and, years later, returns as a new phrase. For some it describes anything beyond the United States. To others it is the institution itself—as in "APMP International." I think it's the gateway for APMP expansion.

As of this moment APMP has more than 5,300 members, worldwide. While the majority are still located in the U.S., bid, proposal, capture, business development, and graphics professionals from across the world are joining APMP in record numbers. For the first time ever, APMP's largest chapter is overseas. APMP UK has more APMP members (1,089) than any other chapter in the world. Industry leaders Ken Newland, Nic Adams, Richard Bannon, Ken Erskine, and Martin Kaye have developed creative and customized membership strategies to broaden our community. Just one country away from Britain, Chris Kaelin (past DACH chair) and Werner Siedel (current DACH chair) are the architects of meteoric growth in Germany. The little DACH (Germany, Switzerland, and Austria) chapter is now APMP's fourth-largest; it is the largest non–English speaking chapter, with 233 members. We have recently been contacted by proposal professionals in Korea to create an APMP Asian footprint.

Whether in the U.K., Asia, India, South Africa, the Netherlands, Australia, or any other part of the world, proposal professionals are rallying around the APMP logo in ways never dreamed of 20 years ago. When told APMP UK is the largest chapter, Ken Newland said, "This is good for APMP." He is right. Thanks to all overseas who have brought true meaning to the word "international" for our great association.

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FROM APMP'S
CEO

STICKING TO THE PLAN

Continuing our designation of 2013 as the *Year of Communication* for APMP, here's an update on what we've accomplished so far and what's in our future.

We've greatly expanded the information available on *www.APMP.org*—and made it easier to find. We've refreshed existing publications and added new ones, making them easier for members to access worldwide. We've added new live events and webinars and made the recordings available on our website. Our new APMP communities are meeting, planning and running events, and conducting surveys.

New and updated offerings to members include:

- New member information webinars
- Quarterly chapter enrichment webinars and the Chapter Liaison Committee
- Publications including the digital *APMP Journal* (biannual), *APMP Reporter* (weekly news), and, coming soon, the *APMP Journal of Research*
- Capture & Business Development Executives Conference developed by the APMP Center for Business Development Excellence
- APMP Bid & Proposal Con 2014
- APMP Capture Community—a group for professionals dedicated to capture planning
- APMP Center for Business Development Excellence—a global initiative focused opportunities for senior managers and executives in business-development management
- APMP Federal Community—professionals involved in all areas of federal bid and proposal management
- APMP Commercial Community—formed in 2012 to bring together commercial proposal professionals worldwide to help advance their careers
- APMP Store—full of relevant books, training manuals, publications, certification opportunities, webinars, the APMP job bank, and member blogs

Additional resources may be found on *www.APMP.org*—APMP Affinity Program, Resource Directory, APMP Body of Knowledge, APMP Speakers Bureau, social networking, and more!

Take some time to reflect on what your APMP membership has meant to you this year and how you've made a difference to your *business winning* community. If you haven't already made a commitment to get involved with your 5,300+ fellow APMP members, now's the time.

If you need help getting involved, email me at *beth.wingate@APMP.org* or Rick Harris, executive director, at *rick.harris@APMP.org,* and we'll be happy to open *communications* with you!

BETH WINGATE, CF APMP FELLOW
Chief Executive Officer
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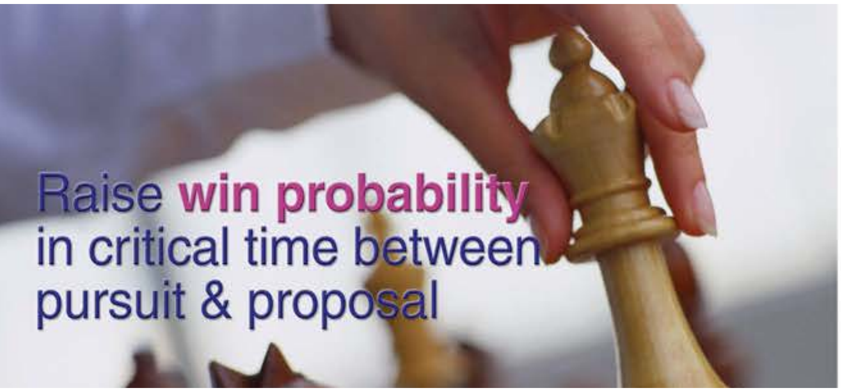
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Two new Lohfeld team books available on Amazon.com

Best Informed Wins

Bob Lohfeld shares his capture management and proposal management thoughts and best practices—along with business development advice for the government contracting industry.

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stages

C CAPTURE **BD** BUSINESS DEVELOPMENT **PM** PROPOSAL MANAGEMENT

10 //

CAPTURE
The art of early-stage identification and qualification of new business

18 //

BUSINESS DEVELOPMENT
The practice of implementing reliable planning and statistically sound data in order to deepen long-term value propositions and relationships with customers and markets

22 //

PROPOSAL MANAGEMENT
The coordination and oversight of all elements of the proposal development life cycle from capture to win

Persuasive Writing

A PROVEN APPROACH TO INCREASE YOUR TECHNICAL SCORE

By Robin Ritchey

OUR PROPOSAL TEAM was recently challenged to significantly raise the technical score on our company's No. 1 recompete without changing our technical approach—a daunting task indeed. Our solution: Use persuasive writing to more effectively *present* our approach. The result: Our score increased from our previous 88 percentage points to 94 percentage points, and we won the $200 million award. Before I summarize our persuasive writing process, it's important to understand how clients evaluate proposals.

HOW DO EVALUATORS SCORE YOUR PROPOSALS?

In "Understanding How Evaluators Score and How to Influence Their Votes" (*APMP Journal,* Fall/Winter 2009, pp. 50–60), Jay Herther, CPP APMP Fellow, provides a compelling case for understanding how human nature dynamics impact the probability of win. Herther explains you must first establish **credibility.** Cite your experience and expertise, supported by third-party testimonials and past performance references. Second, build **understanding—**an emotional connection with the reader. You understand them and the problem they are trying to solve—in other words, you get it. As you build credibility and understanding, the reader begins to feel comfortable with you, to trust you. Only after you have established credibility and understanding

Discriminators FACTS	Benefits to Client UNDERSTANDING	Proof CREDIBILITY
• Quick-learn program combines on-site and e-learning to train teachers.	• Meets subject mastery requirements; reduces cost by 30% and time away from classroom from 5 days to 3.	• Results on ABLE project (reduced cost by 32%; 3 vs. 5 days; 99.4% subject mastery). • Research citation, Smith, 2012.

will the reader look for the **facts—** your solution to their problem.

Credibility, understanding, and facts are all essential elements in crafting complex arguments. Just as a three-legged stool is unstable when a single leg is removed, you are far less likely to win the award if you omit any of these elements (Larry Newman, *Shipley Associates Proposal Guide for Business and Technical Professionals: Winning Business,* 3rd ed., 2006).

HOW TO WRITE PERSUASIVELY

Based on Herther's research, our team developed a persuasive writing process that employs simple heuristic techniques.

The strategic portion sets the stage for your section. Begin by drafting a discriminators/benefits/proof table. **Discriminators** (features of your offer, the **facts** you present) differ from a competitor's offer *and* are acknowledged by the client as important. Both conditions must be met (Newman, p. 50). **Benefits to client** demonstrate a common **understanding** and generally relate to quality, timeliness, risk, and/or cost. Quantify benefits whenever possible. **Proof** provides **credibility** and is essential to substantiate the claimed discriminator and associated benefit. Proof includes specific results, research citations, and client quotes. Herther writes, "Unsubstantiated claims fail; proof with data works." At the top of this page is an example from a proposal to the U.S. Department of Education.

We refer to each row in the table and make it into a win theme. For example: On the ABLE project, our quick-learn program reduced training costs by 32 percent, reduced teacher time away from the classroom from five to three days, and achieved 99.4 percent subject mastery.

The **tactical portion—**or body of your section—presents the **facts** of your solution in detail. A direct response to every client need (or RFP requirement) must be mapped to this section of your proposal. But compliance is only the ante to get into the game. To *win,* you must go beyond compliance and present your win themes in detail. Graphics are excellent ways to showcase win themes: "Graphics are one of the most effective ways to *persuade* the prospect to select your solution. Graphics convey *facts and emotion,* equally important aspects of effective persuasion" (Newman, p. 76, emphasis added).

In addition, writing with the following "Six Cs" in mind will make it easier for decision-makers to select you, not a competitor.

1. **Compliant:** Can I quickly find a full response to each requirement?
2. **Clear:** Is the proposal easy to understand? Does it use simple, declarative statements?
3. **Concise:** Do succinct sound bites reinforce key messages?
4. **Credible:** Is each claim substantiated by proof? Does it avoid superlatives? Does it let the facts speak for themselves?
5. **Compelling:** Does it play to the evaluator's emotions and implicit needs? Does it use precise, powerful, descriptive verbs?
6. **Client-focused:** Do we map features to client benefits? Are benefits stated before features? Does it name the client before, and more times than, the contractor?

The **summary portion** "bookends" your tactical section between a section theme statement at the beginning and your discriminators/benefits/proof table at the end. A theme statement consists of one or two sentences that link client benefits to the discriminating features of your offer. The intent is to build credibility and demonstrate understanding—to tell the reader why they should select you and, subtly, not them. Don't try to summarize everything in the section. The most powerful themes contain the most distinctive discriminators, something the client wants that no one else offers.

In summary, stop writing descriptively, i.e., describing yourself. Instead, write persuasively, telling why the customer should select you, as opposed to your competitors, in the context of what matters to the customer—and watch the award notices roll in! ●

Robin Ritchey is a business development professional with 25 years' experience. Ritchey can be reached at 919-302-4350 or + *robinritchey@hotmail.com*

INFLUENCING THE CUSTOMER

Shaping the Battle Before It Begins

By Michael O'Guin

HOW THE CUSTOMER designs their acquisition has a decisive effect on determining the winner. And therefore, an important goal of a capture plan is shaping the procurement—influencing how the customer structures procurement in favor of your solution. You want to convince the customer to specify a product, service, delivery, and experience requirement that only you can meet, and ask for information that only you can provide. Including these requirements will help differentiate your offering, improving your evaluation score and driving up costs for the competition.

The U.S. Air Force's KC-135 Tanker replacement program is a perfect example. In 2008, Northrop Grumman won the bid. But in 2011, after Boeing successfully protested the award and the Air Force's goal changed from a tanker that's best for fighting wars to a "protest-proof" decision, the government repeated the competition under different evaluation criteria. Even though both competitors bid the same aircraft as before, Northrop Grumman decided not to bid because it felt the criteria were so stacked against it that Boeing was sure to win.

A large, complex sale doesn't consist of a single customer decision; it is a series of events. An event is a scheduled decision-making occurrence that influences the procurement outcome. In the case of an architecture and engineering (A&E) firm that is trying to sell a contract to Exxon to design an exploration site, for example, these are the key procurement events that would follow the initial identification and exploration:

- During its capital-planning cycle, Exxon must decide if it should allocate a budget to develop the site and how much it should be.
- Based on the site's depth, estimated reserves, existing pipeline locations, port facilities, and expected recovery rate, Exxon determines the rig's design requirements.
- Exxon identifies potential A&E companies.
- Exxon prepares a solicitation for an A&E firm.
- Exxon evaluates bids and chooses a winner.

A shrewd A&E firm will attempt to influence every one of these events to its advantage. It will try to ensure that Exxon budgets enough money for its own design concept. It will attempt to convince Exxon that the drilling approach with which the firm has the greatest expertise is the most economical for Exxon. It will try to steer Exxon away from competitors' offerings. The A&E firm will make suggestions on the requirements to include in the solicitation. It will try to influence Exxon's evaluation criteria to emphasize its own strengths. And if successful, the A&E firm will position itself as the natural winner of the competition before the customer even solicits a bid.

You should recognize that different subsets of customers conduct each event—the capital committee determines budgets, while engineering sets requirements. You can influence these events by providing information and persuasive analysis to each subset prior to the event. The analysis delivered should tell why setting requirements in your favor is to the customer's advantage. You need to understand the customer's problems and needs, as well as any information they will use to make decisions. This knowledge can help guide you toward providing an analysis appropriate to sway their conclusions.

A capture plan should position your team to influence the outcomes of the customer's many decision-making events. All of these events can be influenced—but only if the A&E firm understands the who, what, when, and how of Exxon's decision-making process and has a strategy for influencing it. ●

Michael O'Guin is a partner at Knowledge Link, a firm specializing in price-to-win and win strategy development, and recently authored the book *Winning the Big Ones: How Teams Capture Large Contracts*. O'Guin can be reached at 214-865-3349 or + *moguin@mokrk.com*.

BEST PRACTICES

Implementing Best-practice Capture Through Opportunity-specific Learning Events

ORGANIZATIONS CAN DEVELOP SKILLS IN OPPORTUNITY CAPTURE AND SIMULTANEOUSLY ADD VALUE TO REAL OPPORTUNITIES

By Mark Taylor

OVER THE LAST 14 years, I have delivered more than 300 workshops providing training in how to win complex business more effectively. My workshops have shared approaches to help participants be more effective in their opportunity-capture activities.

Across those workshops, I have trained approximately 4,500 participants, some 95 percent of whom have enthused about how they would put their learning into practice. But I am occasionally disappointed to see the degree to which the techniques that were keenly embraced in the warmth of the training room fail to find application in the cold light of the day job.

GETTING BEST PRACTICE INTO PRACTICE

The challenge, it would seem, is getting best practice into practice. Over the last five years, I have increasingly worked with clients to create learning events that center on a real opportunity. My personal views, outlined below, are informed by the experience I have gained through the privilege of working with, and learning from, some of the most capable and insightful business-winning practitioners in the world.

THE NATURE OF AN OPPORTUNITY-SPECIFIC LEARNING EVENT

An opportunity-specific learning event comprises training in capture techniques, using a real opportunity as a case study, with the capture

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team as the participants. The objective of the event is to provide learning for the participants and tangible progress and value to the opportunity at hand.

THE POTENTIAL BENEFITS OF AN OPPORTUNITY-SPECIFIC LEARNING EVENT

The potential benefits of an opportunity-specific learning event are that it:

- Creates a common language of opportunity capture across a multidisciplinary team.
- Supports buy-in from the participants for adopting the new techniques, as they can see the immediate application of their learning.
- Provides a controlled forum to flush out objections, concerns, and challenges.
- Confirms and clarifies roles and operating protocols.
- Integrates group understanding. A workshop can often help capture teams realize what they know as a group and, just as importantly, what they don't know.
- Tests both our knowledge of and commitment to a specific opportunity.

CREATING AN EFFECTIVE OPPORTUNITY-SPECIFIC LEARNING EVENT

An effective event comprises:

- Preparing for the event.
- Holding the event.
- Following up the event.

Preparing for the Event

It is best to base the event on an established curriculum workshop. The preparation is then focused on tailoring to the opportunity.

Agree on measures of success and ground rules with the capture manager. The facilitator must have a mandate to make decisions during the workshop in order to meet the agreed-upon success criteria.

Collate intelligence and prepare starting material. The more prepared you are for the event, the better the outcome.

Holding the Event

Stay disciplined, and stay on task. The facilitator must be prepared to be ruthless with participants—for example, closing down esoteric discussions diplomatically.

Following Up

Ensure the workshop outputs and actions are circulated back to the participants the day after the workshop.

If the success criteria have not been met, say so. If a workshop highlights the fact that an opportunity is ill-suited to the organization, or that capture intelligence is so lacking that it would be inadvisable to continue, then this is a valid outcome. The investment in the workshop will be well spent if it prevents the organization from investing company funds on a lost cause.

I have found opportunity-specific training events to be complementary to curriculum training. I recommend any organization consider using them as a powerful tool in helping to get best practice into practice. ●

Mark Taylor is deputy managing director of Shipley Limited. Taylor can be reached at +44 1935 434333 or
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STRATEGIC PLANNING

A Blueprint for Capture

THE FOUR PHASES OF CAPTURE AND HOW EACH PERSON CONTRIBUTES TO THE POSITIONING EFFORT

By Jay Herther, CPP APMP Fellow

WRITING A WINNING proposal would be a breeze if the capture team did all the positioning before the RFP. "You can't have a blue proposal unless the capture manager hands off a blue baton," said Brigadier Consulting's Bill Brigadier during the 19th Annual Association of Proposal Management Professionals (APMP) Conference in May 2008. This article describes four phases of capture and how each person contributes to the positioning effort.

At RFP release, there are four desired outcomes:

1. An executed capture plan (including win strategy and customer contact plan)
2. An influenced and trusting customer (evaluator) community
3. A "painkilling" solution to address the customer's pain
4. Management's commitment to people, new business funds, and a will to win

To achieve these outcomes, companies can take a core team approach—the capture blueprint—to achieve the outcomes necessary for preparing a winning proposal. Leadership should hand-pick the Core-3 personnel—business development (BD)/sales, capture team leader, solution architect—and assign them early. The capture Core-3 must have passion, persistence, experience, training, and a commitment to capture.

After an opportunity has been qualified and you decide to pursue it, the next four positioning phases are (1) finding the pain, (2) trust-building, (3) shaping, and (4) solutioning. These phases are not necessarily sequential and often proceed in a nonlinear fashion. They are also not discrete from one another, but the model helps frame the tasks required. Here's how each phase progresses, and how Core-3 members contribute.

THE MORE ME-FOCUSED YOU ARE, THE LESS THE CUSTOMER TRUSTS YOU.

PHASE 1: FINDING THE PAIN

BD/sales often flies solo, leading this data-collection phase to tap customer intelligence. As Bob Lohfeld of Lohfeld Consulting says, "Best-informed wins." Often, the customer doesn't have a clear idea of what they want, so testing ideas is effective. For example, no customer ever asked for an iPod or a minivan just from hearing about the concept, but rather wanted the product only after seeing it.

Open-ended questioning and active listening in this phase are crucial to finding the customer's pain points. If you don't do a good job of identifying pain points, you might hear the following during proposal writing: "We don't have a clue what that RFP requirement means." You must understand the operational reason behind the requirement, and knowing what the customer's job is often helps. Think of it this way: No one needs a drill; they need to make holes. Pain points can be technical, such as the need for a lighter-weight solution, or they can be programmatic, such as a need to have the product or service in place quickly. A big sin in this phase is talking too much and "pushing" the solution prematurely.

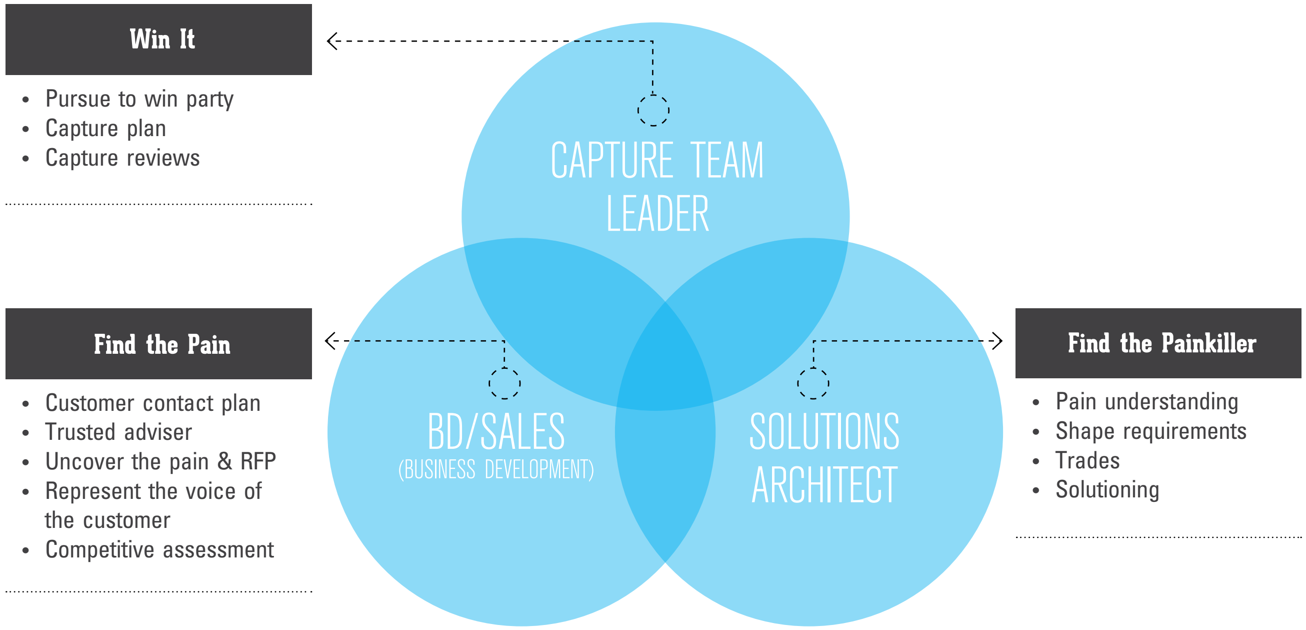
PHASE 2: TRUST-BUILDING

It's a truism that people do business with people they like and trust. BD/sales must serve as the customer focal point and a trusted adviser. Building trust is one of the most important responsibilities of the BD/sales person, and that person does this by doing what they say they will do. Here is an equation for trust, described in the book *The Trusted Advisor,* by David H. Maister, Charles Green, and Robert Galford:

$$\text{TRUST} = \frac{(\text{CREDIBILITY} + \text{RELIABILITY} + \text{INTIMACY})}{\text{SELF-ORIENTATION}}$$

So to build trust, maximize the numerator and minimize the denominator. The "self-orientation" term in the denominator means the more me-focused you are, the less the customer trusts you.

Figure 1: Capture Core-3 Blueprint



Win It

- Pursue to win party
- Capture plan
- Capture reviews

Find the Pain

- Customer contact plan
- Trusted adviser
- Uncover the pain & RFP
- Represent the voice of the customer
- Competitive assessment

Find the Painkiller

- Pain understanding
- Shape requirements
- Trades
- Solutioning

PHASE 3: SHAPING

The shaping* phase is next:

- Shape the acquisition strategy (how the solution is bought).
- Shape the requirements to give the customer the outcome desired.
- Shape the evaluation of how the proposal is scored (the start of Section M).
- Shape the programmatics—schedule, test process, technology readiness level (TRL), maturity, etc.

Of course, simply shaping the RFP to your product is product "push," and you will lose trusted adviser status if the RFP doesn't solve the customer's problem or pain. Neil Piscitelli, head of Citelli Consulting, says one of his customers once lamented, "I am tired of companies coming in to sell me shoes when I don't need shoes."

PHASE 4: SOLUTIONING

This is the phase in which the capture leader and solution architect play. Solutioning is diagnosing, then solving, the customer's pain. In the startup community, they call this "finding the painkiller," and it works best when the customer jointly "owns" the solution.

To accomplish this, Steve Blank, author of *The Startup Owner's Manual—The Step-by-Step Guide to Building a Great Company* with Bob Dorf, advocates a customer-development model. The first step is to "get out of the building" to test the problem (pain) and work on customer validation, he says; you won't find a solution in the vacuum of your conference room. The solution must be a potent painkiller, he adds, and not just "vitamins."

Your solution architect must experiment and test-drive the tradeoffs with virtual or real prototypes, and iterate them with the customer selection panel. A downfall can occur when one becomes wedded to a specific solution, rather than the painkiller a customer needs to take. As proposal pioneer Ed Velton said, "You lose when you bid to yourself!"

Use this four-phase capture blueprint, and your proposals will be compelling, compliant winners. ●

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*Shaping is far upstream from the point of actual initiation of a competitive procurement. Shaping is defined as making customers aware of the range of alternatives and, by dialog, white papers, or marketing, explaining to them concepts and limitations that they may not be fully considering yet. In government procurements, shaping must comply with: (a) the Procurement Integrity Act, (b) OCI (Organizational Conflict of Interest) rules, and (c) applicable anti-trust laws.

BD

BETTER PREDICTIONS

Making Metrics Meaningful

RESOLVING THE 'IRRECONCILABLE' DIFFERENCES BETWEEN MEASURING PERFORMANCE AND GETTING RESULTS

By Howard Nutt

MEASURING THE PERFORMANCE of business development (BD) organizations is frustrating. Business executives want simple metrics that show whether BD activities are delivering the revenue required by the annual business plan. Senior BD managers need data that gives confidence that BD teams are effectively identifying and managing opportunities to produce predictable outcomes. And yet, those responsible for results often have little influence over outcomes of BD pursuits.

An analysis of common metrics used to measure BD performance in companies today shows that most top metrics in use are forensic in nature and don't connect what's measured with the ability to affect outcomes. To make this connection, metrics must measure performance "in process" and translate data outputs into discernible action, as in the case of the "Status of Top Opportunities" entry in the chart below. However, measuring BD operational performance needs to address the full range of BD pursuits, not just the top opportunities.

TOP METRICS, THEIR GOALS, AND KEY ISSUES

We need a way to bridge the gap between measuring performance and getting results. To this end, our work with companies around the world and specific research on BD metrics suggest that BD organizations can use a couple of simple metrics in a more productive way. These metrics are win rate and capture ratio—commonly available, relatively simple metrics that can be used to measure performance and connect it with results in a meaningful way. The secret is to take a different approach to how the data is structured and used (Figures 1, 2), so the metrics transform from historical data into fact-based targeting of results.

RESULTS-ORIENTED MANAGEMENT OF BD METRICS

Performance measurement can shape results only if there is active conversion of historical data into specific actions that can influence outcomes. Begin by recognizing that the data will not be meaningful as a compilation. Parse and analyze data in three or four categories reflecting major types of BD pursuits. In this way, the organization can set appropriate targets for each category and manage resources to a predetermined set of decision protocols.

Next, use historical data and lessons-learned reviews for guidance in setting target win rates and capture ratios for each category; then, determine process improvements that permit more aggressive targets. For example, closer collaboration between BD managers and program managers might make it possible to raise the target for recompeted, incumbent programs 90 to 100 percent.

Third, build a separate "concept of operations" around each pursuit category, prioritizing categories in terms of how the BD process is applied and managed, resources are deployed, and executive managers participate. For example, one company established a dedicated group of capture managers and dramatically improved its capture ratio for strategic pursuits.

Finally, emphasize growth in capture ratio over win rate as the optimum driver for both effectiveness and efficiency. The ultimate goal is to drive revenue and facilitate the strategic growth of the enterprise. Capture ratio best reflects those results.

Of course, adopting this approach is a radical move for most organizations. Shifting metrics from telling what happened to targeting the results desired brings organizations face-to-face with their capability to do what needs to be done to maximize probable success. This makes metrics meaningful and prepares organizations for BD excellence. ●

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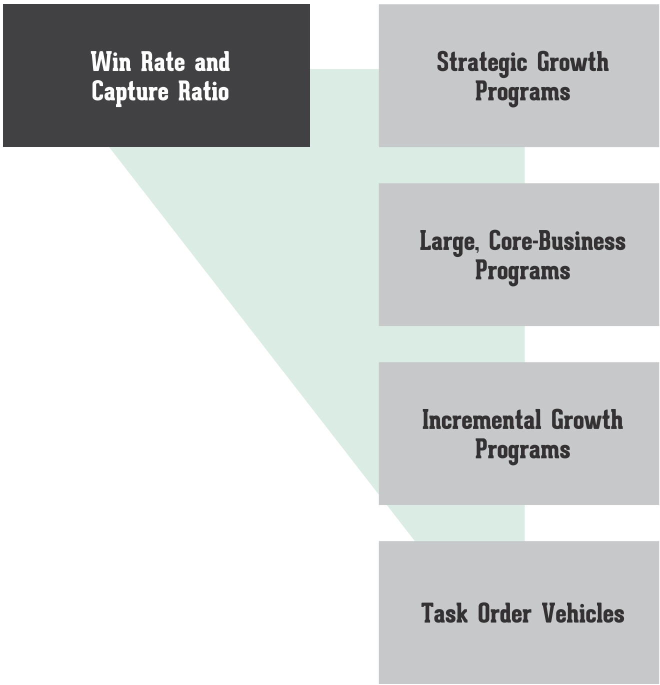
Figure 1: Top Metrics, Their Goals, and Key Issues

Top Five Metrics	Definition/Goal	Key Issue for Influencing Results
COMPETITIVE WIN RATE	Track results of competitive pursuits, often through both win rate and capture ratio	Apply historical lessons learned to improve future performance
STATUS OF TOP OPPORTUNITIES	Assess the health of strategic pursuits for readiness and win probability (PWIN)	Take action in response to health assessment to improve PWIN
REVENUE COMPARED TO TARGET	Track results or completed pursuits against revenue goals	Identify additional revenue opportunities to fill gaps
TOTAL REVENUE IN FUNNEL	Assess the value of programs pursued, typically weighted by PWIN	Maintain qualification criteria that fit the organization's business
EXPENSES VS. BUDGET	Maintain visibility on BD project costs based on budget milestones	Keep weak projects from depleting funds needed for strategic pursuits

Figure 2: Two Metrics That Connect



Win Rate and Capture Ratio	
Strategic Growth Programs	• Set targets based on "roll-up" from detailed analyses • Allocate resources based on PWIN or prioritization • Define strategy, using full range of process resources
Large, Core-Business Programs	• Set "stretch" targets based on historical results (>50%) • Allocate resources based on return on investment • Define strategy, using reasonable process resources
Incremental Growth Programs	• Set targets based on historical results (>75%) • Augment program resources only on exception basis • Support strategy development, if deemed appropriate
Task Order Vehicles	• Set revenue targets based on competitive analysis • Establish marketing plan, with resource allocation • Assign pursuit management team, as appropriate

Measuring a BD Strategy

HOW ONE COMPANY UNDERTOOK A BD-CMM EVALUATION AND COMMITTED TO APPLYING REPEATABLE, DEFINED BUSINESS-DEVELOPMENT PRACTICES

By Ginny Carson, CF APMP

LIFE CYCLE ENGINEERING (LCE) is not a new company. Founded in 1976, the company has a rich history of delivering solutions to the military and private industry. Through most of those 37 years, the company has realized growth by delivering quality services and developing client advocates who endorse the company enthusiastically. These endorsements often result in the growth of existing business and introductions to new customers.

This approach is an art form; the challenge is to apply it to forecast growth. Because LCE's leadership wanted to have more confidence in the company's growth projections, in 2010 they brought in the Business Development Institute International (BDII) to see how this approach would rank on the BD-CMM (Capability Maturity Model). BDII's assessment registered LCE's BD approach only at Level 1 ("Ad Hoc"), and issued eight recommendations to better define it and move it toward the next level in the model ("Repeatable").

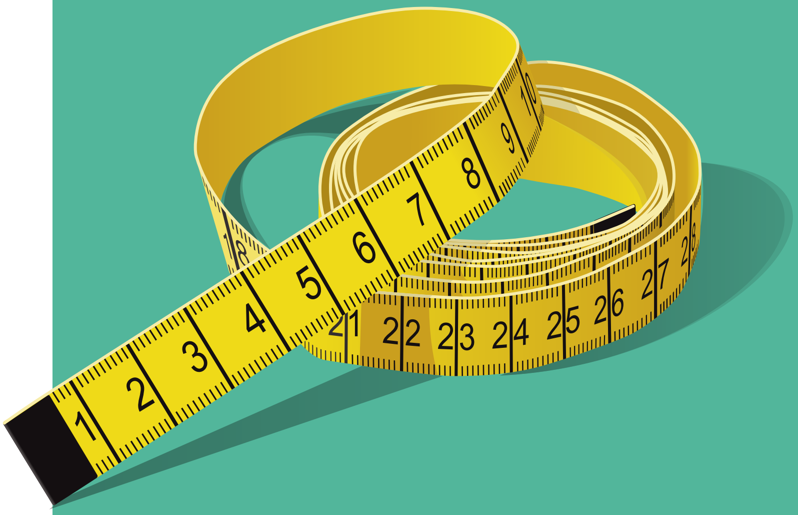
The recommendations required changes in personnel and the implementation of historically unmeasured efforts. Additional challenges loomed in the diversity of services the company provided and markets in which it performed, and stakeholders from every division of the company came together to develop the BD process. They studied best practices

Key Process Categories	Customer	Focus	People	Capabilities
Themes	**Increasing Customer Value**	**Improving Performance and Synergy**	**Building Competencies and Teams**	**Enhancing Systems and Processes**
Levels		**Key Process Areas (KPAs)**		
OPTIMIZING	• Innovation and Transformation			
MANAGED	• Relationship Management	• Enterprise Influence • Quantitative Process Management	• High-Performance Teams	• Business Development Systems Integration • Infrastructure Management
DEFINED	• Solution Development	• Organizational Tactics • Quality Management	• Organizational Competencies Development	• Business Development Processes • Support Systems
REPEATABLE	• Reponse Generation	• Business Developement Administration • Quality Control	• Individual Skills Development	• Sales/Capture Procedures • Work Environment
INITIAL	• Ad Hoc			

Making BD Better

Those considering making improvements to their BD approach should be aware of the following:

- Transparency can be painful. Evolving from an environment in which key personnel hold all the answers to a documented, defined process may expose weaknesses. The upside of this is that once known, those weaknesses can be addressed.
- Executive buy-in is a must. Changing a company's culture and aligning to industry best practices cannot be accomplished from the bottom up.
- Best practices must be referenced. The BD-CMM is an excellent tool for measuring existing practices, and the BDII and APMP communities offer excellent resources.
- Be objective whenever possible. The BD-CMM allows a dramatic reduction in subjectivity. At LCE, we asked, "Is this behavior repeatable? (Can we duplicate this outcome?)" and "Is this behavior defined? (Can we reference a written process?)" in order to improve the assessment's objectivity.
- Manage the change. Never forget that the greatest variable is the human element. The application of proven change-management techniques will support the effort.
- You get what you measure. Gain buy-in on identified metrics whenever possible. Make sure that the metrics chosen can't be met without engaging in the desired behaviors.



and reviewed current practices. The end result was a BD process with seven phases, documented roles and responsibilities, and a common language. Difficult as it was, the creation of a common process was a small challenge compared to the resolve required to implement it.

In many ways, LCE was perfectly positioned to implement the new strategy: Executive sponsorship was strong. Change was already afoot, with the company's first major leadership transition underway. Growth was steady, and the company had secured a spot at the top of a "Best Places to Work" list in its home state of South Carolina for yet another year. But change is never easy when confronted with human nature. Late in 2012, LCE conducted an internal assessment to see how successful its implementation of the new BD process had been. The company was now representing behaviors consistent with Level 2 ("Repeatable"), but still short of its Level 3 target ("Repeatable and Defined").

The new assessment identified gaps between LCE's BD practices and the best-practice standards consistent with Level 3. But the best strategies for closing those gaps going forward are less clear. Continued executive sponsorship is a must, and agreement on the metrics associated with desired practices will be required from all stakeholders. Variations among LCE's customers must be reconciled to a common process. Fortunately, LCE's leadership is staying on course, driving toward repeatability and definition in BD behaviors. The payoff will be sustainable growth and a more stable environment for employees. ●

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Would You Build an Ark Without Tools?

BUILDING A PROPOSAL OFTEN LEAVES ROOM FOR INTERPRETATION, SO HAVE 'POWER TOOLS' AT THE READY

By Donna M. Creason, CF APMP

WHEN GOD ASKED—er, commanded—Noah to build an ark in the biblical story, he provided instructions. As a matter of fact, God was relatively specific about how the ark should be built: "Make yourself an ark of gopherwood; make rooms in the ark, and cover it inside and outside with pitch. And this is how you shall make it: The length of the ark shall be 300 cubits, its width 50 cubits, and its height 30 cubits. You shall make a window for the ark, and you shall finish it to a cubit from above, and set the door of the ark in its side. You shall make it with lower, second, and third decks."

Many procurement notices are written like this: Parts of the instructions are very specific, while other parts leave room for interpretation. Nevertheless, every proposal response should focus on one primary goal: meeting the customer's needs.

So, why are so many proposal professionals still ignoring the groundwork? The reasons could fill a book, but here are three of the most common:

- "We're still determining our pursuit decision."
- "It's a quick-turn proposal; we don't have time."
- "It takes time away from proposal writing."

Excuses aside, it's not hard to imagine the outcome of Noah not having followed God's instructions. Here are four "power tools" that can facilitate compliance and responsiveness, so that we don't create unnecessary "flood" situations of our own.

Power Tool #1: A Requirements Analysis Matrix (RAM) that solidifies your pursuit decision. One of the quickest ways to uncover customer needs is to prepare a RAM directly from the solicitation. Created as a simple table, the RAM helps you formulate a rational pursuit decision, outline customer requirements, and determine the resources required for proposal preparation.

Power Tool #2: A Comprehensive Compliance Matrix (CCM) that tracks requirements. Once you have a basic list of requirements, you're ready for a next-generation RAM. The CCM doesn't need to be an entirely new table; simply add columns to your existing RAM. Whereas the RAM basically shreds the solicitation and finalizes your pursuit decision, the CCM assumes a "go" decision and helps establish an approach for responding, determines where to address requirements in the proposal, and validates that all requirements have been addressed by functioning as a cross-referencing tool.

Power Tool #3: A Simple Proposal Outline (SPO) to structure the proposal. Drafting an SPO coincides with the CCM. If you've used the first two tools, the good news is that you've already started on an SPO. The SPO will go through several iterations as you complete the CCM, until you eventually have validation for organizing the content in a way that answers the customer's questions and concerns; a structured, clear, and easy-to-follow proposal; a compliant proposal that addresses all requirements; and organized content that's easy to compare against evaluation criteria.

Power Tool #4: Help your writers by creating an Annotated Proposal Outline (APO). In my experience, procurement notices rarely facilitate the preparation of clear-cut responses. However, this shouldn't prevent you from creating an APO to guide writers. Use the APO to assign proposal sections to subject-matter experts and other proposal contributors, with the added benefits of establishing proposal structure, preventing duplication and redundancies, and minimizing compliance problems.

Test-drive these proposal fundamentals through your own process. Demonstrating success at the outset will help win buy-in from others, so try to improve your own personal efficacy, then bring others in on the process. And don't get caught in a proposal "flood" without an ark—or the power tools to build one. ●

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AN ORGANIZED TOOLKIT

Your Proposal Toolkit—To the Rescue

By Margaret McGuire, CP APMP

THE RFP HAS just been released, and—despite all your planning and pre-proposal work—you feel the pressure of a looming deadline. You hear the ticking of the clock winding down. What can you do to ease the pressure and quiet that incessant ticking? Perhaps one of the simplest things is to assemble a robust proposal toolkit—and do it before the RFP is released.

What, exactly, is a proposal toolkit? It is a set of tools designed to be used together for the particular purpose of proposal development. Some prefer to call it a proposal "arsenal," but I think of it more broadly as an organized collection of templates, ready-to-use files, reference files, software tools, and Web links to use throughout the proposal development life cycle.

I suspect most of you already have a proposal toolkit of some sort; you probably just don't call it that. No matter what name you give it, though, the key is to make it robust. You must make sure it includes the tools you regularly use during proposal development, and organize it so that you can find what you need quickly.

Templates will constitute the largest number of tools in a proposal toolkit. Most of us use a proposal template to give a consistent look and feel to documents; it belongs in your toolkit. One of the templates I use most (after my proposal template) is my schedule template. At the beginning of each year, I create a blank calendar marked

with company holidays. I copy this file for each proposal I manage, deleting the irrelevant months and populating it with proposal deadlines, milestones, and meetings.

Another often-used template is the contact list. To save time, you can pre-populate this list with the colleagues you typically have on your proposal team. It's far easier and quicker to delete entries than to type them into a list for each proposal. If your company has an electronic version of its letterhead, this is also a good toolkit candidate. Keep it with the other tools so you won't waste time searching for it when you're ready to write a cover letter. Other templates you might want to consider for your toolkit include a capture brief, kickoff brief, compliance matrix shell, proposal outline matrix, action items list, question log, graphics log, color review score sheet, delivery receipt, and lessons-learned brief.

You should also collect ready-to-use files for your toolkit, such as your company logo or any checklists you use during the proposal life cycle. Include reference files such as your boilerplate and style guide. Do you have a master list of acronyms that you use frequently in proposals? That belongs in your toolkit, too. Other tools may be your company's authorized signatory/approval levels; shipping account information for FedEx, UPS, and the like; and if your company has offices across the country or globe, a time-zone matrix. Bookmark links to websites you reference frequently during proposals. Consider sites such as online dictionaries, acronym definers, Federal Acquisition Regulation (FAR) clauses (if you write proposals for the U.S. government), and business-development services.

The final component of your toolkit is software tools. What software or apps do you use during proposal development? Pick the ones that fit your work style and needs, and download and install them now. They key is to make sure everything is ready for use when the RFP is released and the clock starts ticking.

To make a toolkit robust, start by collecting what is easy: the tools and templates you already use. Find a convenient place to store the toolkit—on your hard drive, on a network drive, on a SharePoint site, or in cloud-based storage. [For another suggestion, see last issue's suggestion for sharing: Google Docs.] Wherever you choose, make sure it's easy for you to access. Organize your toolkit in whatever way makes sense for your personal style. No two of us categorize and name things in the same way, so do what works best for you.

Next, create the "missing" templates you want to use. Maybe take one you used previously, remove project-specific content, and tweak it to be the template you envision. Take the time now to customize corporate templates with your name and contact information. And finally, expand the toolkit. After you submit the proposal and have a moment to breathe, think about what files or templates you had to create during the proposal. What information did you need to research? Apply these lessons and add the new tools to your toolkit. When the next proposal begins, they will be there exactly when you need them.

If these steps seem simple, they are. Each tool by itself probably won't save you a significant amount of time, but the full toolkit—used across the proposal-development life cycle—will. Toolkits reduce preparation time and let you and the rest of your proposal team focus on developing a solution specific to your customer's RFP requirements, without having to reinvent the wheel every time. ●

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PM

ON WRITING

Writing Compelling Content

By Larry Newman, CPP APMP Fellow

WHAT DO PROFESSIONAL proposal writers have in common with professional writers of literature, comedy, essays, nonfiction, movie scripts, and news reports? They all write in genres characterized by patterns, styles, and conventions that have been proven effective. Our genre as proposal writers is “persuasive” writing—writing that attempts to convince readers to embrace a particular point of view.

As Dr. Larry Freeman, an early mentor of mine at Shipley Associates, once noted, “Organization is the key writing principle. If the organization is sound, you can make numerous other errors and likely be successful. Get it wrong, and nothing will save your document.”

Writing compelling content requires two fundamental elements: Following a consistent, repeatable writing process (Figure 1), and adapting a consistent pattern, organization, or template. The focus of this article is the second element—a four-box organizational pattern (Figure 2) that is applicable to most business communications, including memos, proposals, letters, executive summaries, and presentations. Below, there is a definition for each of the four boxes and suggested adaptations for different types of communications.

GRASPING THE FOUR-BOX TEMPLATE

The four-box template, shown in Figure 2, has four fundamental elements:

Box 1: Summary. Placed first in the event your reader stops reading, the summary states a primary point, claim, or the answer to a question. Note that the title might be separate or part of Box 1; for simplicity, I made it part of Box 1. If readers are persuaded to accept your idea at this stage, you have met your goal.

Box 2: Introduction. If the summary spurs interest, the introduction tells readers what will follow—the topics and order of the topics. Without a clear concept of what follows, readers will be reluctant to accept the information presented in Box 3, the body. To be persuasive, you *must* get readers to accept your information.

Box 3: Body. Present the information in the exact order introduced in Box 2. To build and maintain credibility, keep your word by following your own introduction.

Box 4: Review. Repeat the key point(s) from the summary in Box 1. Box 4 is optional, but repeated items are more likely to be remembered. If you think readers will skip the review or summary, you can eliminate Box 4.

By the end of Box 4, readers have read your claims and supporting information, and had your opening assertions reinforced through repetition—a persuasive organizational pattern.

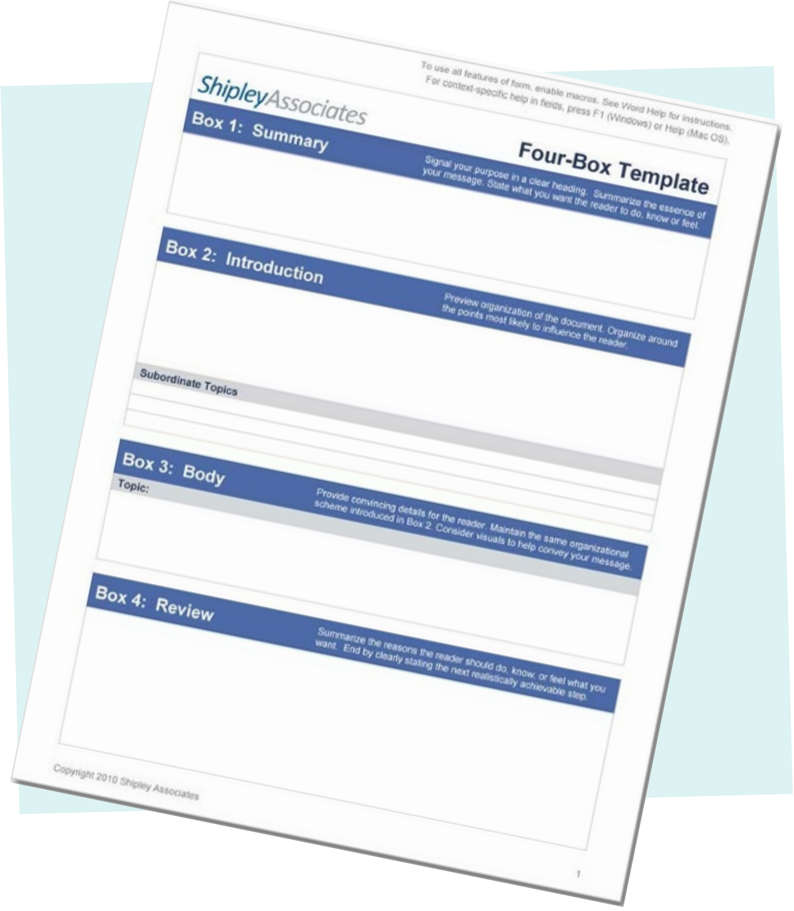
ADAPTING THE FLEXIBLE FOUR-BOX TEMPLATE TO YOUR OBJECTIVES

Proficient writers adapt the four-box template to each audience, context, and type of document. Figure 3

(Continued on Page 28)

Figure 1: **POWeR™ Writing Process.** To save time and be more effective, follow a consistent, repeatable writing process.

PLANNING	• Determine your objective (to do, know, and/or feel) • Analyze the prospective audience • Analyze message content • Select the optimal medium • Develop content
ORGANIZING	• As instructed by the customer • Summarize, then support • Use four-box organizational approach • Determine what will be emphasized
WRITING	• Draft • Use the emphasis techniques
EXAMINING	• Cool the draft • Seek outside review (peers, managers, customer)
REVISING OR REHEARSING	• Make your message clear • Make your message concise • Make your message correct



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To use all features of form, enable macros. See Word Help for instructions.
For context-specific help in fields, press F1 (Windows) or Help (Mac OS).

Four-Box Template

Box 1: Summary

Signal your purpose in a clear heading. Summarize the essence of your message. State what you want the reader to do, know or feel.

Box 2: Introduction

Preview organization of the document. Organize around the points most likely to influence the reader.

Subordinate Topics

Box 3: Body

Topic:

Provide convincing details for the reader. Maintain the same organizational scheme introduced in Box 2. Consider visuals to help convey your message.

Box 4: Review

Summarize the reasons the reader should do, know, or feel what you want. End by clearly stating the next realistically achievable step.

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Figure 2: **Four-Box Organizational Structure.** Apply this organizational structure to virtually any type of business document.

Figure 3: Adapt the four-box template to your objectives.

	Contents			
Document Type	**Box 1**	**Box 2**	**Box 3**	**Box 4**
EMAIL/MEMO	Insert informative title and summary request.	Insert supporting points in order of importance to reader.	Address each point in order.	Restate request and next step.
LETTER PROPOSAL/ EXECUTIVE SUMMARY	Present theme, vision, and linking statements.	Preview key points.	Address each point in order.	Restate theme and suggest next step.
PROPOSAL	Use specified title, e.g., executive summary.	Preview organization.	Present in same order.	Insert optional summary, space permitting.
PROPOSAL QUESTION	Insert summary answer.	Preview supporting points.	Discuss points in order.	Insert optional summary, space permitting.
PRESENTATION	State engaging theme statement to gain interest.	Review and confirm agenda.	Present each point, repeat agenda, and bridge to next point. Repeat.	Repeat introduction and link to next step.

summarizes the contents of each box for five types of persuasive documents composed by proposal writers.

Adapting the four-box template to your writing and presentations requires three actions on your part. First, you must practice using this organization for most of your writing and presentations. Next, you should adapt the template to the different challenges each situation demands, rather than just writing something and planning to edit it later.

Finally, you should resist boilerplate. Unless the prior document followed the four-box organization, you are adapting a faulty organization that is less likely to be persuasive. If a boilerplate document is organized according to the template, revise Box 2, align your solution to those points, and then focus on Boxes 1 and 4. Often, writers find that beginning with Box 2 is easier than working through the four boxes in order.

By consistently applying the four-box template throughout the sales cycle, you can align the communications to advance each sale and improve your persuasiveness and success. In short, mimic professional writers' best practices by following a consistent, repeatable writing process and adapting an appropriate template for your endeavor's persuasive writing genre. ●

Larry Newman, CPP APMP Fellow, is a consultant, author, trainer, and coach. Newman has presented at more than 20 professional association conferences, including the 2009 APMP Conference. He is vice president and a founding partner of Shipley Associates. Newman authored the *Shipley Proposal Guide,* which was awarded the Society for Technical Communication's Award of Excellence in 2008, Shipley's *Capture Guide (2nd Edition)* and *Business Development Lifecycle Guide,* and developed a Proposal Guide podcast series in 2008 for APMP, which is downloadable on iTunes.

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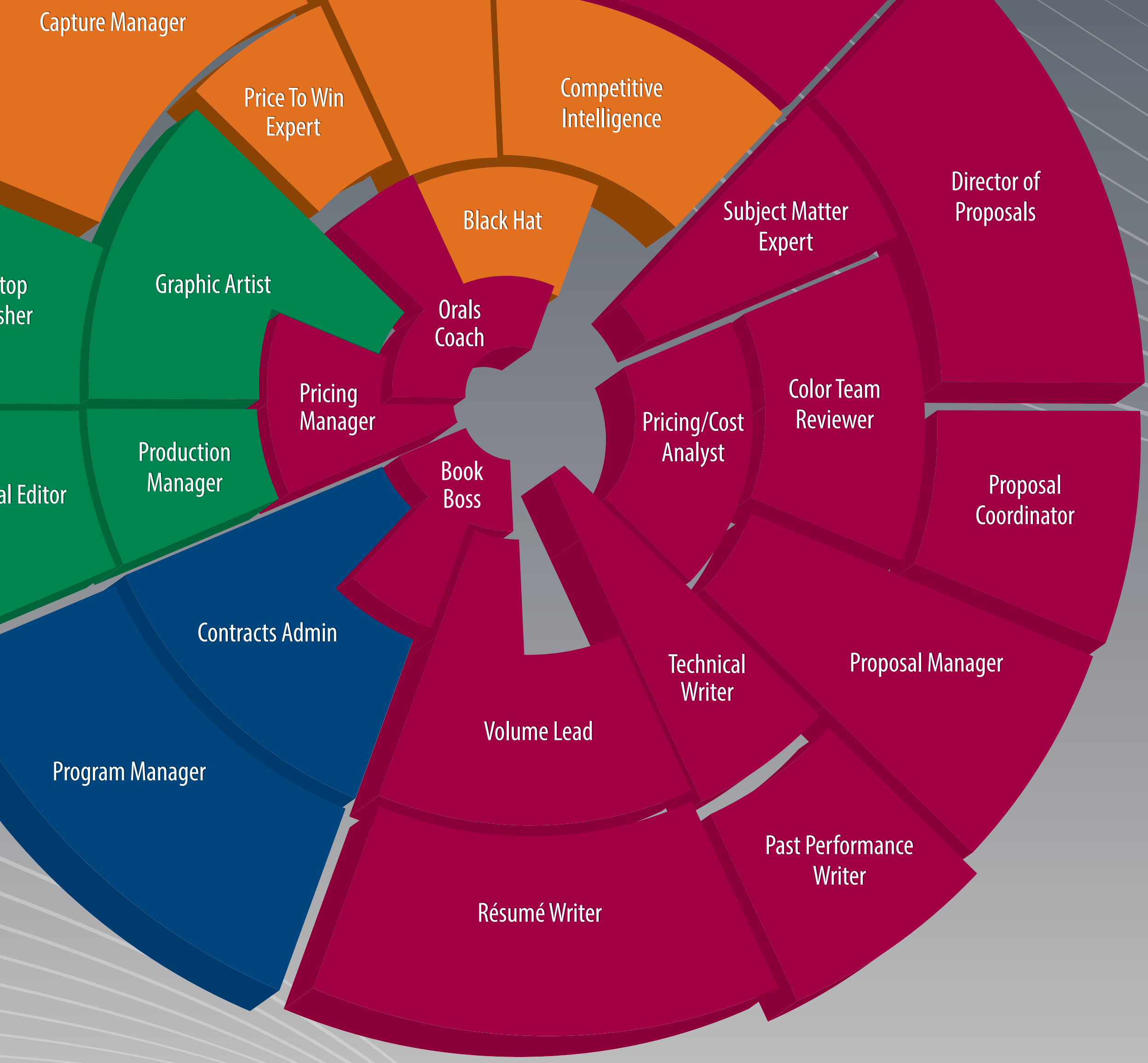
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Competitive Intelligence
Black Hat
Subject Matter Expert
Director of Proposals
top
sher
Graphic Artist
Orals Coach
Pricing Manager
Pricing/Cost Analyst
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PERSONALITY TRAITS

Confessions of a Flexible OCD

A FORMULA FOR EFFECTIVE PROPOSAL MANAGERS

By Danielle O'Grady, CF APMP

WHEN WORKING IN the world of proposals, the proposal manager is the ringmaster, the creative writer, the group psychologist, the referee, and the shipping manager. There are strategies and discriminators to incorporate, client hot buttons to weave throughout, ridiculous font restrictions to which to adhere … and then there's that sneaky amendment that gets released the night before the proposal is due!

What sort of person can best handle those challenges? I posit that the ideal personality type for success in this demanding role is "Flexible OCD." I'm a Type A, anal-retentive, undiagnosed obsessive-compulsive proposal manager. I appreciate order, I like my chairs at a 45° angle, I have my papers organized just so, and I *love* checklists—color-coded, of course.

With the amount of detail and compliance checks that go into a given proposal, paying attention to the details is paramount. I'm all about the details. When I was 6 years old, I insisted on placing all 64 Crayola crayons back in order after finishing with my coloring book. Nothing has changed. I'm meticulous about my proposal directive, proposal checklist, and production checklist. I check and recheck compliance at all stages of proposal development. There are too many things in life I can't control—so the things I *can* control, I will.

My conviction that this personality type I have termed Flexible OCD is particularly well-suited to proposal management comes from many years as a proposal manager. I inherently appreciate systems, processes, and organization. (My formal education is in chemical engineering, if that explains anything.) I pride myself on being able to see my proposal plan objectively, while incorporating the creative sales spin and strategies that lead to winning. Yet I always strive to remain adaptable enough to change mid-course—whether I want to or not.

SOMETIMES A LITTLE OCD HELPS—ESPECIALLY WHEN YOU REALIZE IT CAN STAND FOR "ORGANIZED, COMPLIANT, AND DETAILED."

And that brings us to the crux, because in all of my detail-oriented glory, I recognize that the key is to remain flexible. Amendments come out, requirements change, questions are answered in ways we wish they weren't, and due dates are extended. And that's before someone on the proposal team gets the flu, has a flat tire, misses a proposal deadline, or forgets to obtain the bid bond. In this deadline-driven world of proposals, I can't afford to pout and whine for hours when I could better spend the time quickly assessing and adjusting to the changes. There's no crying in baseball … or on proposals.

On the surface, my organization and OCD-like behavior are seen as rigid and uncompromising. However, those who have worked on my proposal teams know better. I am quite receptive to alternative ways of doing something, and I pride myself on forging strong proposal team relationships that allow us to quickly and effectively change course when needed.

Granted, I'm very picky about how I want things. I like things to be nice and neat, including my proposal process. After someone leaves my office, I will get up and move my guest chairs back to a 45° angle. But that has never compromised my productivity or my ability to accept new ideas that provide a solid benefit or an alternative approach to the proposal. We work in a crazy world of requirements and limitations, while trying to sell the very best of our depth and breadth to our clients. And sometimes a little OCD helps—especially when you realize it can stand for "organized, compliant, and detailed."

If you find yourself to be anal-retentive when managing or a little OCD when preparing your compliance matrix, I say embrace it. No one should ever lose a bid due to a compliance flaw, but you must remain flexible and adaptable throughout the process. It's of value to your sanity and to your team. If your team doesn't see you panic over amendments and changes, then most likely they will keep their own panic in check. And if you ever need practice in embracing the Flexible OCD personality, I highly suggest buying a box of 64 Crayola crayons. ●

Danielle O'Grady, CF APMP, is director of government proposals at Tetra Tech. O'Grady can be reached at 973-630-8504 or + *danielle.ogrady@tetratech.com.*

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How to SPIN® More Awards Out of Thin Air

By Stacey Piper and Christy Hollywood

Questions are a powerful capture tool. By asking probing questions, you can demonstrate knowledge of an industry without pushing your product/service. By inquiring, you can draw out information from your customers and help add value to the conversation by causing them to look at a problem from different perspectives. By facilitating self-discovery, you enable the client to identify challenges and what is important to them. They will place a higher value on what they ask for than what is freely offered.

An age-old commercial selling framework, “SPIN® selling,”[1] can be applied to federal business development (BD) and used to uncover and develop client needs at various stages of the government sales life cycle.

S-P-I-N® is simply a mnemonic to help practitioners remember the four types of questions they should use to uncover and develop client needs. Nevertheless, SPIN® selling often gets a bad reputation—because people equate “spin” with politicians trying to put a “spin” on bad news. However, SPIN® selling is truly a customer-centric, consultative selling style that uses “investigation skills” that starts with assessing the SITUATION.

Federal professional services firms employ this model, because the interview technique is especially powerful when used not only during an official sales call but also throughout the entire sales and project delivery process. Examples prove the method’s value at many points in the federal BD life cycle.

If you are in the implementation phase of a project, a client conversation can uncover clues about other potential work that the agency/office might have. Ask a PROBLEM question: “What are the biggest challenges you face in order to keep project funding?” Answers might open the door to add-on work or existing work you could do differently to help the client, which will surely solidify your firm’s position on the recompete.

When positioning yourself versus an entrenched incumbent, you may have heard about some potential performance issues. In the capture phase, ask an IMPLICATION question: “What happens when you experience reporting errors or delays on project metrics?” The client’s response might help them realize just how big the problems could become if issues persist. You could help them see that a dissatisfaction they have with the incumbent, which they have been perceiving as relatively minor, could have far more serious impacts on the program.

When positioning for a new opportunity driven by a new federal mandate, you face a few contractors who are well-liked and capable, and who hold the right contract vehicles. The client is feeling forced to comply with the mandate and doesn’t necessarily even know how to meet the requirements. Pre-RFP, you could ask a NEED-PAYOFF question: “What measures do you think are most critical to demonstrating success against the milestones related to the executive order?” This will open up a dialogue that will make the client feel proactive and in control, while giving the consultant insight as to what might be perceived as the most valuable aspects of a technical strategy.

If you want to SPIN® more awards out of thin air, just be sure to ask the right questions. ●

Christy Roach Hollywood is principal of Hollywood & Associates, Ltd. Hollywood can be reached at 202-670-3417 or + *christy@hollywood.com.*

Stacey Piper is senior director, federal marketing at ICF International. Piper can be reached at @stacey_mktg (Twitter) or + *stacey.piper@icfi.com.*

Notes

1. Rackham, Neil. SPIN® Selling. New York: McGraw-Hill, 1988. Print. *http://www.amazon.com/spin-selling-neil-rackham/dp/1565114205.*

S Questions are rooted in learning facts and background about the "as is" **SITUATION**.

P Questions probe to learn about the **PROBLEM,** difficulty, or dissatisfaction the client may have.

I Questions strive to escalate urgency by identifying the **IMPLICATION,** effect, or consequence that results.

N Questions are used to determine the **NEED-PAYOFF,** usefulness, or value of a given solution.

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WHAT

ARE THE REASONS PROPOSALS DON'T WIN?

ARE COMMON TRAITS OF PROPOSALS THAT FAIL?

APMP staff asked members for their answers to these questions. Here are some of your responses:

BILL DAILEY • VICE PRESIDENT
BIZCONNEX LLC

In my experience—which includes being a member of government SSEBs—the name of the game in responding to RFPs is "make it easy on the evaluator." Keep in mind that most SSEB members have been pulled away from their regular jobs to take on the daunting and frequently mind-numbing task of working through a pile of proposals. They want to get it done quickly and efficiently and get back to the emails, voice mails, and regular business piling up on their desk. The harder it is to wade through your text to find the required RFP items to be addressed, and the further your proposal deviates from the Section L RFP topic order, RFP terminology, and Section M criteria used in the RFP scoring scheme, the lower your score will be!

You may still end up being rated as compliant or acceptable, but that's not good enough to win.

With that in mind, these are my top 5 from a "how easy is it from an evaluator's point of view to rate your proposal against the RFP required discussion areas and evaluation?" criterion:

1. Failure to follow the RFP topic outline exactly.
2. Failure to use the RFP terminology. "The RFP says to discuss *this*, but we know what they really want us to discuss is *that*."
3. "We'll just describe our team capabilities, what we do and have done that's similar to the RFP requirements, and they'll obviously conclude we're the best solution."
4. Unsupported statements like "We're your best value/low-risk/uniquely qualified, etc., etc." that essentially insult the evaluator's intelligence.
5. One other reason that—rightfully or wrongfully—is a fact of life in our business is the government has pretty much made up its mind in advance on who they want to get the work. That is the rather large—but unmentionable—elephant standing in this discussion room!

THOMAS LEECH • OWNER
TOM LEECH WINNING PRESENTATIONS (THOMAS LEECH & ASSOC.)

Mine is a bit different perspective, that of a proposal orals coach, having coached about 250 teams over the past three decades:

1. Competition's lower price. A team I recently coached did very well in their customer presentation (per later review board feedback); were told later Brand X undercut all competitors' prices by 30 percent. Gone.
2. Poor preparation and team performance at proposal orals. Here are two real quotes (received later) from two teams with orals RFP format sample tasks (where they give you a representative task order to prepare from scratch—no computers or PPNT): Team A. "We

botched the sample problem ... and lost."
Team B. "Wow! We aced that sample problem. Our preparation really paid off."
(Won the bid.)

3. Inadequate preparation for post-orals Q&A. In a meeting with BizDev and CEO of a team that lost, they said they lost their bid on one question in orals to a prime subcontractor who would not give a positive answer. They agreed that practice sessions with potential Qs was critical—they had not tried out that (critical) Q in rehearsals. Likely would not happen today with rule allowing only clarification Qs.

One message is that it's valuable to get, when you can, review board post-orals feedback. Another is to assess your (and others') flaws and successes, and apply lessons learned to the next proposals.

ELISE GILBERT, CF APMP • DIRECTOR, SALES SUPPORT SERVICES IRON MOUNTAIN

1. Lack of differentiation.
2. Price.
3. Misaligned references.
4. Lack of strong relationship to or advocacy for prospect.
5. Poor solution fit.

LEE HENDRICKSON, CPP APMP FELLOW • PROPOSAL MANAGER FLIR SYSTEMS

I am amazed when an RFP is brought to me but no one has laid any significant groundwork with the customer to understand what they want (beyond what is stated in the RFP). You must differentiate yourself from the competition, and that implies an understanding of the customer's hopes, fears, and biases.

BRIAN BARTHOLOMEW • CHIEF TECHNOLOGY OFFICER ADVANCED RESOURCE TECHNOLOGIES INC.

1. Noncompliance. This gives the reviewers an easy way to weed through the proposals and get rid of a few.
2. Lack of content planning—or poor capture management.
3. A proposal focused on the company providing the proposal rather than the client and their needs.
4. Pricing. This comes back to poor capture management and not knowing the client's needs and budget.
5. Poor proposal structure—making it hard for the evaluator to score your response, structure that does not follow the same flow as the RFP, using words that are not in the RFP—although they may have the same meaning, grammar, spelling, etc.

CHRIS SIMMONS • PRINCIPAL RAINMAKERZ CONSULTING LLC

1. Poor planning.
2. Insufficient resources and/or poor proposal development discipline.
3. Little or no capture information about the customer or the competition.
4. Lack of proposal development processes, templates, and tools.
5. Appropriate emphasis on pricing strategies, analysis, and development.

JOHN W. STEVENS JR. • PRESIDENT & PRINCIPAL SYNERGISTIC SERVICES, INC.

1. Lack of intimacy with the customer. You must keep in mind that there are three customers, not one: the buyer or acquisition customer, the user customer, and the requirements definition customer. Only through intimate professional relationships with these people who comprise "the customer" will you understand the customer's needs, wants, and fears. Only through these intimate professional relationships can you influence the user's concept and description of their needs, the definition of the requirements, and the procurement acquisition strategy. Only through these relationships can you develop a solid understanding of the competitive

environment—including the customer's perception of the competitors.

2. Lack of executive buy-in and support. If you do not have a strong advocate or "sponsor" within the bidding organization, you will face opposition from within, it will be difficult to obtain the budgetary resources you need, and you will not be able to have the dedicated personnel with the right knowledge and skill sets needed to craft a winning solution and proposal.
3. Failure to create and execute a strong win strategy well in advance of the procurement. A strong win strategy should lead to the creation of discriminators that do not initially exist. The win strategy should drive your major teaming and organizational decisions. The win strategy should drive development of your baselines. Finally, the win strategy must be implemented through a set of specific tactical actions, each of which must be assigned a project manager or leader, a budget, and a schedule.
4. Failure to create strong viable baselines for your technical offering, your program plan, your organization, a price baseline, and your relevant past performance. The baselines define and document your solution *before* the RFP and preferably before the draft RFP is issued. The technical baseline should define not only your proposed overall technical solution, but also the trade-off analyses and make-buy decisions that drove your solution—as well as *why* your solution is the best possible one and the benefits it brings to the customer. The program baseline should define your implementation or execution schedule. In essence, the program baseline should constitute either an informal or formal integrated master plan (IMP) and integrated master schedule (IMS)—not necessarily called that, but a conceptual IMP/IMS that describes how you will execute the program.
5. Failure to use a highly skilled and experienced proposal manager (I know this is self-serving, but true), program manager, and chief engineer to lead the proposal using a structured process that is tailored to the needs and schedule of the procurement and that imposes process discipline, schedule discipline, and high standards for the compliance and responsiveness of the proposal, combined with a compelling description of your value proposition of why you.

Of course, these may change based on many factors, as is well exhibited above. Notice I did not address pricing much at all. I did this intentionally, because I view a winning price as a result of doing the right things in items 1 through 4 above. I also intentionally avoided discussing specific steps or approaches such as price-to-win, black hats, competitive analysis, color team reviews, gate reviews, and many others, as I see these as implementation-specific and not necessarily universal. For example, am I going to perform a rigorous price-to-win analysis on a nonstrategic, low-value pursuit? Probably not. Am I going to perform a rigorous price-to-win analysis, competitive analysis, black hat review, etc., for a strategic, multibillion-dollar program? You can bet your sweet patootie I will.

> You must keep in mind that there are three customers, not one: the buyer or acquisition customer, the user customer, and the requirements definition customer. Only through intimate professional relationships with these people who comprise "the customer" will you understand the customer's needs, wants, and fears.
>
> **JOHN W. STEVENS JR.**

MIKE PARKINSON, CPP APMP FELLOW • PRINCIPAL
24 HOUR COMPANY

My top 3 are easy:

1. Poor capture management/sales. (This includes lack of competitive intelligence and not "stacking the deck in your favor." In my experience, poor capture/sales is the No. 1 reason most proposals lose.)
2. Pricing.
3. Poor communication or miscommunication. (The best/most qualified solution provider can lose if the future client doesn't understand your solution and why you are the best solution provider—for example, making the proposal difficult to evaluate, using poor writing, bad or no graphics, no clear benefits, and no discriminators.)
4. Unprofessional. (For example, inconsistencies, poor writing, bad layout, lack of aesthetic appeal, poor editing, etc.)
5. Poor or no marketing. (Your future customer does not know you, what you stand for, or your USP.)
6. Lack of process or structure. (Crafting a winning response requires processes born from experience.)

PAUL THIELEN • CORPORATE COMPLIANCE DIRECTOR
HERDT CONSULTING, INC

Reading all of these responses, it appears that the No. 1 reason (stated several different ways) is lack of customer knowledge/intimacy. I call it the Golden Rule of opportunity screening: "If the first time you have scoped this requirement or built your CRM folder is at RFP release, you already lost."

NIGEL THACKER • MANAGING DIRECTOR
REBIDDING SOLUTIONS

I just finished some research of procurers, which was focused on recompetes rather than bids in general. One of the questions I asked was, "Why do incumbents lose?"

There was a range of answers—some of which are covered in the comments above, but for recompete bids, the answers seemed to be:

1. Not delivering on the contract. As the incumbent, you've got a great opportunity to put yourself in a good position for the recompete—but if you haven't performed on the contract, you start the bid on the back foot. Seventy percent of respondents said this had an impact on their decision. An additional 18 percent said it was the most important thing they based their decision on.
2. Not focusing on the recompete with as much intensity and drive to win as you would a new bid. The word that kept coming up in respondents' comments was complacency—which often seemed to come from an assumption that the customer would pick the incumbent anyway (because they had done a good job, or the competitors couldn't understand the contract well enough to put in a good bid, or the risk of change was too high), so the incumbent bid team didn't need to try as hard to win as they would if they were bidding for a new customer.
3. Not focusing on the customer's needs for the next contract. This came across in comments along the lines of "too many recompetes just offering business as usual," "no innovation," etc.
4. Not answering the questions set. This seemed to come from either knowing too much about the contract as it is now and/or the incumbent thinking the customer already knew all about them, so they didn't need to tell them again in the written response.
5. Lack of preparation. This didn't come from direct comments in the survey responses but seems to lie behind a number of the issues. You need a good capture effort to win a new bid. Incumbents seem too often to forget they need the same.

> "Us. We. Us. We." And the customer's sitting there going, "Yeah, but what about us? What are you going to do for us?"
>
> **DAVID SEIBERT**

DAVID SEIBERT • PRESIDENT
THE SEIBERT GROUP, INC.

I operate in the nonfederal world (commercial and state/local government), and by far the single biggest reason proposals don't win is because vendors respond to RFPs they receive "out of the blue." They have no prior relationship with the buyer, they have no understanding of the buyer's needs, and in many cases they didn't even know the RFP was coming. But they think they have a chance, so they respond anyway. Then they lose.

After that, one of the biggest reasons proposals lose is because they are more about the seller than the buyer. Instead of saying how they're going to use their products and services to solve the buyer's problems, they plug in lots of boilerplate information that is almost entirely seller-centric. "Here's who *we* are. Here's what *we* do. Here are the awards *we* won. Us. We. Us. We." And the customer's sitting there going, "Yeah, but what about us? What are you going to do for us?"

BOB FREY, APMP FELLOW • PRINCIPAL
SUCCESSFUL PROPOSAL STRATEGIES, LLC

Lack of demonstrated and documented *understanding* of the customer's operational environment, business objectives, mission goals, governance framework, and political and fiscal challenges, both now and over the course of the contract life cycle. Of note is that past performance does not equal *understanding*. However, relevant risk identification does support the *understanding* section(s) of a proposal.

Lack of a clearly illustrated and described *approach*—with specific details regarding the people, processes, and tools/technologies that will be leveraged to achieve the requirements in the Statement of Work, Statement of Objectives, or Performance Work Statement.

Lack of sustained, front-end business development activities through which the customers' hopes, fears, biases, critical issues, and success factors become known (and then documented and applied in the proposal), and also through which an organization's solutions can be pre-vetted with the customer's decision-makers for the specific procurement.

No clear articulation of "evidence of *strengths*" that a company will bring to a given federal agency/line organization, which align with the specific Section M, Evaluation

Factors for Award, and are conveyed in quantitatively and qualitatively rich terms of (1) enhanced quality, (2) schedule adherence, (3) cost control and/or mitigation, and (4) risk mitigation (along with safety, productivity, security, export control, etc.). Importantly, the government does not care about industry's "themes"—it cares about, and reports its findings from source evaluations in terms of *strengths*, weaknesses, and deficiencies.

Lack of close integration and connection across all sections of the proposal. Too many times, the key elements conveyed in the management approach section do not appear in the résumés of the project manager and/or task leaders/functional area managers. And the building blocks of the technical approach are not reflected in past performance citations, indicating that the company has not performed work before in the manner in which they are proposing now.

DAVID CHRISTOVICH • VICE PRESIDENT, FEDERAL CONTRACTS EDUCATION AND TRAINING
THE TOTAL MANAGEMENT GROUP & GOVERNMENT CONTRACTS INSTITUTE

1. The vendor proposes a solution that is "better" than what the government specifications require. ("We don't do what they want done, so we'll propose what we do do.")
2. Irrelevant past performance. ("We've never done this before ... but we could!")
3. Unqualified staff ("Ol' Fred's 40 years of work in the fabrication shop make him more qualified than any college kid.")
4. An illiterate proposal ("Hey their, spellin' don't kount, har-har.")
5. A clear inability to control the outcome of your promises ("Our technical staff certifications, DCAA-compliant back office, security clearances, HUBzone certification and 11 pending court cases will all be successfully resolved by contract award.")

One good thing about the field we've chosen: Hope does indeed spring eternal.

MATTHEW KELLEY • PROPOSAL MANAGER
SEGUE TECHNOLOGIES, INC.

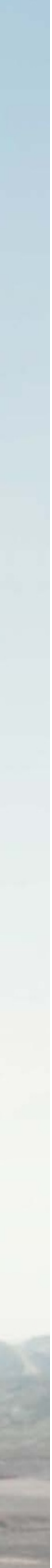
1. Your proposal is not from the incumbent.
2. Your proposal does not include the incumbent on your team.
3. You have not positioned your company to be the one favored by the government prior to RFP release. (You and the customer don't know each other, and you are guessing at the price—what they are thinking and what it will cost to successfully support the work.)
4. You have poor past performance and relevant technical experience to do the work (should have come to a no-bid decision on your own before the customer did it for you).
5. Proposal stuff—bad outline, poor grammar, noncompliance, uncompelling write-ups, ugly graphics, uninspired action captions, lack of proposal process, planning, and templates (I'm not sure any of No. 5 actually matters after Nos. 1–4, but they definitely improve the quality of your proposal product; they just don't matter if you were meant to win or not already). ●

Have any additional comments to share with your colleagues and fellow members? Please write to APMPJournal@theYGSgroup.com *and look for your comments in our next issue.*

GETTING RESPECT

EXPAND YOUR INFLUENCE AND HEIGHTEN YOUR PROFILE AS A PROPOSAL PROFESSIONAL

By Robin Davis and Melissa DeMaio



The lack of respect for our roles is a common complaint among proposal professionals. But if you feel like Rodney ("I don't get no respect") Dangerfield in your career, you can do something to get the respect you deserve. The key to expanding your influence and heightening your personal profile is to build trust—and to build trust, you must effectively communicate your value, serve your internal clients, and strategize.

COMMUNICATE YOUR VALUE

Change the perception of what you have to offer by communicating and demonstrating your value as a proposal professional. There are three ways to do this:

- Document and share what you do. Describe your role, responsibilities, skill sets, tasks, methodologies, and best practices. Develop standard operating procedures and process flows, and present them to the company leadership.
- Leverage your affiliation with APMP. When you present your processes and methodologies, refer to APMP guidance: "I didn't make this up," you'll say. "I do it this way because the worldwide authority for professionals dedicated to the process of winning business says that's the way it should be done." Also explain that your membership offers access to people, education, and tools you can't get anywhere else. Last, get certified. Certification demonstrates a personal commitment to your profession and career. You've got skills, and APMP certification proves it!
- Be a team player and share your knowledge. You are the SME (subject-matter expert) when it comes to proposals. You also know a lot about your company—more than most—because you write about it every day. Share any relevant information with colleagues so that they can do their jobs better.

SERVE YOUR INTERNAL CLIENTS

A sales representative or account manager is the owner of the sale, and as such, your internal client. Build a consultative relationship with internal clients, and you will earn their respect. Here's how:

- Invest in the relationship. Get to know your sales reps, professionally and personally. Find common ground on which you can build. Talk about how you will work together (e.g., determining preferred methods of communication), the role you will play, and who will do what. Initiate a social relationship by extending an invitation to lunch or another social activity outside the office.
- Deliver on your promises. Do what you say you're going to do, while managing expectations. Be honest, consistent, and inclusive.
- Be proactive. Be prepared when an RFP comes in. Is your knowledge base up-to-date? Do you have tools and templates in place? Do you have ample "bandwidth?" A proactive approach will build confidence in your ability to deliver and help put stakeholders at ease.

THINK AND ACT STRATEGICALLY

You want your contributions to be recognized, and you want to be seen as a leader. Getting the attention of the company leadership through thoughtful communications can do just that:

- Relate what you do to the big picture. Know your company's revenue and growth goals, and your department's goals and performance metrics. Draw the connection between what you do and how it helps meet those goals. Speak the language of your leadership by reporting on what is important to them.
- Share market intelligence with other departments. Through RFPs, you know what buyers are looking for and expect. Share these insights with your colleagues and leadership through routine reports and/or feedback loops.
- Get more involved. Know what the competition is doing and how your company compares. Expand your perspective by getting involved in client research, relationship mapping, and preparing for orals and debriefs. Use this information to be more strategic in your approach to the proposal.

By following these three steps, you will be able to take the lead in managing your career. With communication, relationship-building, and strategic thinking, you can earn the respect you deserve. ●

Robin Davis, CF APMP Fellow, is a proposal and sales operations consultant with more than 20 years of experience. Davis specializes in strategic sales communications and is an elected APMP Fellow, leader of APMP's Healthcare Industry Task Force, and frequent speaker at industry events.

Melissa DeMaio, CP APMP, has served as a senior communications and pursuits strategist at EY for more than nine years, and now leads the firm's Financial Services Office proposal center. DeMaio also serves on the APMP Board of Directors and co-chairs APMP's New York Metro Area Chapter. The views in this article represent the views of the author, and not necessarily those of EY.

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Book Review

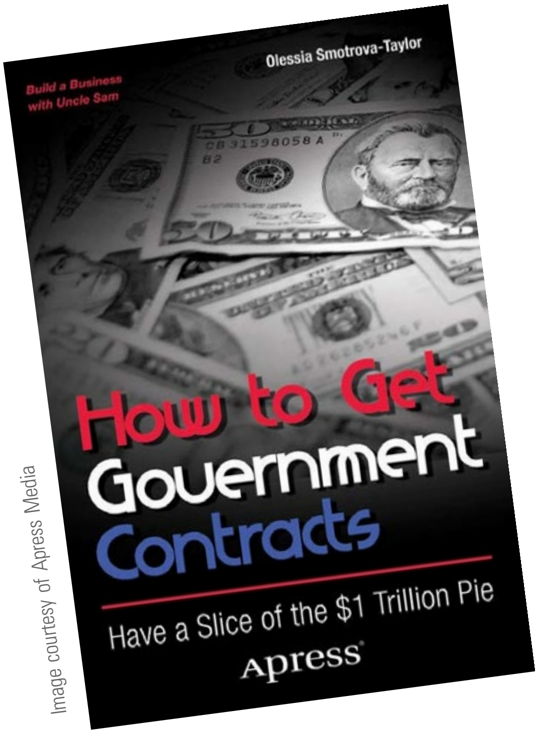
Olessia Smotrova-Taylor
Build a Business with Uncle Sam
How to Get Government Contracts
Have a Slice of the $1 Trillion Pie
Apress

Image courtesy of Apress Media

How to Get Government Contracts: Have a Slice of the $1 Trillion Pie

by Olessia Smotrova-Taylor

Review by Jim Hiles

At first brush I was put off by this book. Just looking at it made me cringe a little. *How to Get Government Contracts,* the cover screamed—promises of a piece of the "$1 trillion pie" on top of a montage of $50 bills. I had long ago learned to not let myself be dissuaded from being seen with books that others wouldn't think much of, like trashy beach novels or obviously self-published tomes with garish headlines. I was having second thoughts with *How to Get Government Contracts,* though.

I am familiar with, have been duly impressed by, and have learned quite a lot from Olessia Smotrova-Taylor's publications. Her *Executive Summary Secrets* is one of my all-time favorites. So ... on with the read over a long weekend of traveling.

In the preamble, the author outlines three major barriers aspiring government contractors face: the proverbial "red tape," learning the ropes of finding the right customers and opportunities, and creating a bid engine with high win rates. The intended audience is owners or managers of aspiring government contracting firms. The topics are effectively and thoroughly covered, and they include specific references and URLs that point to the author's sources—additional information for the reader. The depth and range of topic coverage exceeds the norm of books written for this audience and purpose.

While many familiar topics are addressed, there is plenty to learn and be updated on. For example, in the chapter on analyzing your competition, the author offers a method for overcoming the sometimes overwhelming task of researching and analyzing a crowded, competitive field. Smotrova-Taylor offers straightforward and understandable steps to scope a competitor search effort, THE DEPTH AND RANGE OF TOPIC COVERAGE EXCEEDS THE NORM OF BOOKS WRITTEN FOR THIS AUDIENCE AND PURPOSE.

which can be made easier by grouping competitors by type or by creating ideal competitor threat profiles of the most realistic yet threatening parties you expect to encounter.

The author brings to this book the perspective of a consultant well-versed in the methods of highly successful firms, along with that of the owner and builder of a business based in part on competing for government contracts. “Good teaming partners are like parking spaces at the office,” Smotrova-Taylor writes. Using this analogy for the up-early work ethic, mindset, and attributes to look for in a partner, she describes how to build a bid team. Throughout the book, her matter-of-fact tone has the feel of an experienced practitioner sharing in first person what works and what doesn’t, without hiding the nuggets behind a façade of teasing with partial information to produce a sale. The primary source of reference is the author’s own experience, although in several places specific outside sources are mentioned, including APMP.

The author’s main contentions are that better contractors improve safety, security, and other functions of government, and that armed with the right knowledge and insights, you and your firm can have a win-win relationship with the government that contributes to the betterment of our daily lives and comes with a positive return on investment. *How to Get Government Contracts* is a worthwhile read, as either a refresher or a roadmap to growing your firm. ●

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IMPRESSION

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WHAT ARE YOUR GOALS FOR 2014?

ANSWER

One of my goals for 2014 is to continue to be active in the Greater Midwest Chapter. I was privileged to be elected to the 2013 Chapter Board, and I would love to continue that in 2014.

Question & Answer

With Mary Robertson

WHAT IS THE BEST ADVICE YOU EVER GOT?

ANSWER

Some of the best advice I ever received came from my maternal grandfather, a man I greatly admired, who told me, "If you do it right the first time, you won't have to do it again." This adage is particularly appropriate for the proposal process of fast-approaching deadlines, where it is easy to succumb to the "Don't worry about it now. Just get it in there. We'll deal with it later," way of thinking. Unfortunately, this usually leads to a mess that has to be cleaned up during those precious hours before the deadline, when there's no time to waste. In keeping with Grandpa's advice, I take time to do things right the first time, so I don't have to deal with redoing them later—when I really don't have the time.

WHAT PERSONAL TRADITION HELPS YOU MEET KEY PROPOSAL DEADLINES?

ANSWER

I rely on a personal axiom: "Don't take the absence of 'no' as a 'yes.' " In our line of work, following up with people is an essential activity to meeting key deadlines. If you send someone an email to request they perform a certain task, don't assume they will do it; follow up to make sure you get whatever you've requested.

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and then they buy!

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