Highlights on news and educational initiatives throughout the association at large

Association Spotlight

Benchmark Study Being Published

Just completed, APMP's Benchmark Study charts and compares companies performing proposal management services. Compiled with assistance from Shipley Associates, the survey compares participating companies in the context of a Carnegie-Mellon Capability Maturity Model tailored to the proposal industry. As reported at APMP's annual conference (May 2002), it highlights trends used by companies to progress from beyond Level 1, Initial Business Practices, to take them as high as Level 5, Optimizing, embracing the most appropriate practices that make a proposal operation successful. It reveals the trends other companies are finding successful. Used properly, it can eliminate costly guesswork and wasted man-hours supporting processes that may be less than ideal. Our final collection of data will soon be published and available to APMP members.

Salary Survey For 2003

Next year's study will focus on salaries. With nearly seven years since the last survey, we look to update salary amounts, strategic position titles and responsibilities, and to document a career path through the Proposal Management field. Additionally, in acknowledgment of limited budgets, we will try to determine critical core skills within a proposal department, note what positions lend themselves to multi-tasking, and what skill sets are most commonly outsourced. We intend to validate our salary data through an independent agency that compares our data with those gathered outside our organization. Our goal will be to arm you, our members, with industry information that will help you to be paid adequately for all you are worth!

14th Annual Conference in New Orleans, May 21-24, 2003

Our 14th Annual Conference will fully embrace APMP's new mission statement:

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

As this mission statement indicates, we are placing greater emphasis on business development, capture management, competitive intelligence and analysis, program management contributions to new business, and the importance of knowing your customer (we will also continue to emphasize traditional proposal management subjects).

Look for a wide array of customer and other featured experts in these areas who will bring value to the first-time and regular attendee. Look as well for some experimentation in the form of a competitive simulation involving multiple teams.

David Bol & Eric Gregory

Proposal Management

Cover art by Doron Krinetz

Even our commercial (non-military) members favored this cover over less demonstrative concepts. Security is crucial. Threats abound. We are at war.

spring-summer2002

The Journal of the Association of Proposal Management Professionals

IN THIS ISSUE

Ironic Implications

Of a Good Idea

Proposals as an Inexhaustible Topic

Who knew that four years running, the *Proposal Management* journal would prove to be so interesting? Instead of exhausting proposal topics, we are overrun with ideas to explore. Every avenue of investigation becomes a journey of Tolkien proportions. It is but one of the ironies implicit in the work we do.

One Product of Hard Work Is Joy

Working on or for something valuable begets the greater desire to work. The quality products that come from hard work become their most enduring reward. This works for proposals, and also works for this journal. Its quality, professionalism, and beauty are a tribute to the people who bring each edition to life. Like many, I feel a debt to the team of volunteer staff members and authors.

Jayme Sokolow, Rich Freeman, Rick Rider, Linda Mitchell, and Doron Krinetz have been part of a talented and creative core team from the journal's start. Greg Wilson, Amy Bennington, and Jennifer Parks are all continuing from the previous year. Many of the Editorial Advisory Board members are continuing service from years past, including Robert Frey, Ali Paskun, Bob Myers, Bob Baker, Nancy Cottle, Kate Rosengreen, Tom Boren, Phil Egert, Chuck Keller, Diana Love, Bill Painter, John Davis, Linda Arnold, and John Elder.

Add to that list each article's author, including this edition's guest columnist, Tom Amrhein, who has written a compelling Trends & Views column under the title "Failure to Lead, Leads to Failure."

It is a great privilege to work with such talents and to be a witness to the professional maturation process that APMP and this journal help to spawn.

Security and Insecurity As Synonyms

Two of this edition's articles (by Tom Cavanaugh and Denise Rhea-McKenzie) address the topic of proposal security, a topic held hostage to runaway technology advances and the moving target presented by people who wish to infiltrate, steal, or harm. Security is a discipline replete with irony and demands for caution. It teaches us, for example, that user-friendly is also abuser-friendly. Or, as Cavanaugh has quoted Voltaire in his introduction to benevolent threats: "Lord, protect me from my friends; I can take care of my enemies."

Audience, Not Author, Drives Proposal Design

This is one of David Pugh's "Bidder's Dozen: Golden Rules for Winning Work," an article featured in this edition. And like his attendant observations — that "Virtual planning is virtually useless" and the notion that evaluators (in the early phases) are not looking for a winner, they are looking for losers — you will find his insights both provocative and germane.

Enduring (Wistful) Perception That Quality Can Be Quick

In her "Proposal Production Primer," Suzanne Kelman debunks the myth that proposal production timelines have been shortened as a product of modern desktop publishing and advanced technology tools. In fact, the very opposite may be true if you are facing the demands of a large, color proposal document and its electronic counterpart with hyperlinked files on a CD-ROM. The lessons implicit in Kelman's piece should not be ignored.

Giving is Receiving

What better way to view the benefits of "Workplace-Classroom Collaborations," as explored by Professor Roger Munger? His service learning experience, recommendations, and sample agreement provide a convenient road map for any corporation interested in putting bright college interns to work .

Continuing in an academic spirit, we give you reviews of three proposal management texts in this edition's column on book reviews.

Best Solutions Are Often Ones You Can't Buy

This concept is often true and sometimes applies to proposal tools, as discussed by Greg Wilson in this edition's Products-Commerce column. Though Wilson is normally discussing the benefits of commercially available products, this time he makes a case study of “Developing In-House Proposal Tools.” The examples he cites are inventive, streamlined, and, in some cases, less expensive than commercially-available alternatives. They are sure to inspire members facing limited budgets or tailored processing needs.

Nietzsche As Relevant to Proposal Management?

Assistant Managing Editor Jayme Sokolow, an attentive student of history and philosophy as well as proposals, turns his attention on the infamous 19th century philosopher, Friedrich Nietzsche, to derive a kind of self-help guide for proposal professionals today. Who knew?

Conceived in the spirit of recent books purporting to relate Machiavelli or Sun Tzu to modern corporate management, Sokolow finds some potent relevance from the person who said: “Why does man not see things? He is himself standing in the way…”

Notion That Wit Informs

Fishing about for something witty, we turned to fisherman and former APMP CEO Eric Gregory, proposing to learn how he “proposes” persuasively to a fish. Unexpectedly, we got something even better in his contribution, “Reeling in the Big Ones,” which asserts and describes several undeniable parallels between reeling in new business and fish.

Please enjoy your profession’s ironies, just as you enjoy its unique and unusual work.

Dennis

Letters are an occasional feature of the professional journal. Please address your email or mail to the Managing Editor (reference Journal Staff page).

The Need to Freeze Drafts While Being Reviewed

Has anybody noticed that our proposal drafts are often being rewritten while our pink, red, and gold (or other draft color) teams are reviewing them? The end result is that much of the strategy, direction, and philosophy derived from the all-important reviews are really moot—because the document given to the review team is not the same as the one that exists after the review. This new set of circumstances (coming about in the last 8-10 years), is a result of new technology—each of us involved in the proposal process, including writers, now has his or her own computer. This disparity was never an issue when draft sections were given (many times in longhand) to word processors to type and the word processors maintained the only “current” copy. After a review, writers were given a copy of their typed section(s), and they produced new ones based on reviewer comments.

The way reviews work now is that a cut-off day and time are established by the proposal manager (possibly working in concert with the technical manager when the overall schedule is developed) for the writing to stop so the draft can be prepared for the upcoming review. Each writer electronically sends the latest copy of his/her draft to the proposal manager, the entire document is printed, and copies are given to the review team. When the information “dump,” if you will, is relayed to the team by the reviewers after their review, it is based on the document the reviewers reviewed, and their comments, etc., are based on what they perceive to be the only current data. Theoretically, once the review team has relayed their suggestions, redlines, additions, deletions, etc., their information (when applicable) is incorporated to produce a new draft. In truth, this is not the way the process actually works. In many proposal environments, the writing does not cease while the document is under review. Each writer continues to create and/or change text and graphics while the document is being reviewed. He or she is then given changes from the review that may or may not now apply—even though the comments are valid and may make the difference between a win or loss for the company.

I am certainly not suggesting that we revert back to our longhand and/or word processing days. New technology in this area has made our jobs so much easier in thousands of ways. I do believe we need to change, however, and I think the key to it is education—helping proposal writers and other team members understand the importance of leaving the draft proposal “as is” while it is under review. I look at it this way—writers get a good review of their individual section(s) plus direction on how to make the proposal a unified document that reflects the overall proposal strategy. In addition, while the document is “frozen,” it is an excellent time to do something other than proposal work for a few hours or maybe for a day or so. I think most proposal team members will agree with me when I say a break from proposal work is not necessarily a bad thing!

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Failure to Lead, Leads to Failure

The Art of Proposal Management

Leadership on a proposal is no different from many situations we encounter in our business and our personal lives. It is good to have catch phrases for leadership, but what does leadership really entail?

By TOM AMRHEIN

I recently worked with a client who was about to acquire another company and was looking for support during the Merger & Acquisition (M&A) process. His difficulty lay in trying to fuse different cultures, satisfy varied expectations, encourage people to work for the common good, and end up with an enterprise that increased shareholder equity. It occurred to me that proposal management has much in common with the M&A process. A team is formed to win a competitive procurement and thereby increase the company's value. It is composed of members from various companies or divisions within a company. Each person tries to optimize his or her company's workshare, future job security, and personal and professional development. Of course, each company has a culture or process, which it firmly believes is better than anyone else's process. If the team does not come together in time to work to a common objective, a competitor wins, in the same way a merger or acquisition can fail. The bottom line is that leadership on a proposal is no different from many situations we encounter in our business and our personal lives. The operative word is leadership.

I titled this article the "art" of proposal management because I believe that a structured textbook approach is a necessary but not a sufficient condition for winning. A template or checklist helps, but it is only by getting a sense of the dynamics of the situation, and each situation is different, that a leader is able to forge a team out of all the disparate elements. I tell the new employees at SM&A that **Failure to lead, leads to failure!** It is all well and good to have a catch phrase, but what does leadership really entail?

First of all, a leader focuses on the big picture. Too many times, people who are supposed to be Proposal Managers act like Volume Leads. They channel all their energies into ensuring that the page count is correct and that the artwork has the right action captions. They say, "Nothing goes out without my stamp of approval." Maybe it is a question of style, but I think that you are creating a bottleneck and a single point of failure. My view is that a leader gets the right people in the right assignments and then trusts them to do the right thing. In his book, *Good to Great*[1], Jim Collins paraphrased this concept when he stated, "… good to great leaders … got the right people on the bus, the wrong people off the bus, and the right people in the right seats—and then figured where to drive it."

A Proposal Manager has to take the higher ground. What is the strategy for winning? Do we have the right team? Too often companies ask the question, "What is it going to cost to bid?" The right question is "What is it going to take to win?" The correct answer may mean that significant investments have to be made. This is a difficult and usually painful discovery. Then there is the question of what and who? What is the right organization to effectively execute the program and who should be put in charge?

These are all tough questions, and the list goes on: What are the customer's biases and preferences as well as his values? Is our solution based on meeting the customer's needs, or are we trying to find a use for some product from our Research and Development department?

A leader has to resist the temptation to take the easy way out. It is not pleasant to deliver bad news or to be a naysayer. I have known people who chose to be Book Bosses because they felt more comfortable dealing with authors than they did fighting with management. The Proposal Manager is the one tagged with the responsibility for the success or failure of the effort, and some just do not want that much pressure. A true leader accepts the challenge.

This leads me to the "people" dimension of leadership. To the extent you are able to make things happen, here are a few ideas for getting the most out of the people assigned to a proposal team:

- Find the best people and use them to win—regardless of where they are in the corporation.
- Assign the right person to the task, regardless of position, company affiliation, or workshare.
- Match the staff's background to the proposal phase—if it is a design phase, populate with designers. If it is a production phase, staff with people who understand production and support.
- Staff to the customer's organization—mirror their organization and their makeup.

You are off and running with an excellent team, management is committed, and they have provided the resources to make this a winner. How do you sustain the momentum? This requires the "care and feeding" of your proposal team. Things like coaching, inspiring, mentoring, and evaluating are important. Giving feedback early and often is key so that your team understands your expectations as well as their progress toward achieving team goals. A good proposal leader can see when one of the team is failing. Get that person help, or get that person replaced. You are not doing anyone any favor by letting a team member fail, especially if that person is trying hard and just cannot make it happen

Be advised that it is the small details that do the most damage. You would be surprised at how often the most sophisticated IT companies equip their own facilities with the equivalent of "stone age" tools. Nothing can de-motivate more than having antiquated computers that are slow and/or crash frequently. When your creative juices are flowing, you do not want to have to wait in a printer queue forever. It is the proposal manager's job to ensure that this does not happen and that the equipment and supplies necessary to do the job are on hand. People who are asked to co-habit a proposal area for extended periods of time should be given comfortable quarters. In this role, the proposal leader is much like an umpire in a ball game. If you are doing your job right, nobody notices.

What happens next? All too often things change! The delivery date moves to the right. A series of amendments change the nature of the offering and the value proposition for the company. A requirement for an oral presentation gets added. Management is having second thoughts about the level of commitment. The technical team insists on tweaking the design. It is enough to drive you crazy, and such perturbations take their toll on the proposal team. This is when all of your leadership skills come into play. No matter how badly you personally feel, know that all eyes are on you: you are setting the tone for how your entire team will respond.

Here are some ideas for ensuring that the team does not burn out in the home stretch. Get your organization and technical baselines set very early in the proposal process and ensure buy-in by management. Do not permit any changes or revisits unless RFP changes necessitate them. I would much rather have 90% solutions, about which the team can write compellingly, than struggle for the perfect answer that arrives too late, if at all. Coming together too late means that you are stuck with glaring inconsistencies between volumes. Freezing the design early also limits churning which causes the production staff to become apoplectic.

In the final run to completion, know that extra effort will be needed just as people get extremely tired and quality control begins to fail. Try to plan on a fresh set of eyes to help with the final reviews and to ensure that the correct files are sent to the printer or put on a disk.

It is important to promote and ensure good morale. This starts with treating people respectfully and soliciting their opinions, rather than telling them what to do. You need to be their champion. Very rarely does a company's management realize the sacrifices that proposal management professionals are called upon to make. I have recommended that Business Development personnel as well as other "fast trackers" be required to do a tour in acquisition management so that they can see what really happens. Such a tour would also help them understand whether current or planned proposal efforts are truly opportunities, or suicide missions. Our customers are equally guilty. A tweak to the RFP or an Amendment at the twelfth hour is no big deal, at least in their minds.

I always plan a recognition program for authors, which rewards the best, the most, or the first. It can range from something as simple as your name on the wall, to a gift certificate, to getting a weekend off. If time permits, schedule a luncheon or evening get together. This is especially valuable when you have a large team and very few people know one another.

Remember that morale issues extend outside the proposal room walls. If at all possible, try to include families in these activities. At the very least, let all proposal team participants know why the company is submitting the proposal, and what winning the contract will mean for them and for the company.

This leads to my final consideration—winning versus losing. The difference between the two is often a razor's edge. Unless one competitor has a true discriminator, evaluators are left to choose between multiple attractive offerings. A choice is made and we hear the announcement. If it is a win, we get our pictures taken, go to a win party, and get some kind of financial thank you.

You should always ask for feedback. There are lessons to be learned from winning as well as losing. What if the news is not good? Corporations are so results oriented that they never recognize effort. In fact, the proposal team is likely to feel isolated as people pull back, not wanting to be associated with a loser. Often, finger pointing begins. At this moment, your true leadership skills are tested. Call your team together, counsel them, recognize the value of their individual and group contributions, and discuss what can be learned from the effort's shortfalls, so that none on the team ever have to repeat a similar losing exercise.

I know that being a proposal leader is a very difficult and often discouraging job. When you are feeling down, stop for a minute and realize that the results of your efforts will influence the lives of others for years to come. As leaders, our job in guiding a team to victory is awesome. Go out and win!

Tom Amrhein is currently the President and General Manager of SM&A, Inc, a management-consulting/proposal development firm, located in Newport Beach, CA. Prior to that, he was President and General Manager of SM&A's Systems Solutions Group, an engineering services company. He joined SM&A in 1995 after working for Martin Marietta in Orlando and Baltimore. He also served in the Office of the Undersecretary of Defense for Research & Engineering, the Office of the Assistant Secretary of Defense for Program Analysis & Evaluation, and as a Legislative Fellow, House Armed Services Committee. Tom can be reached at tom.amrhein@smawins.com.

1 Collins, James C., *Good to Great*, Harper Collins Publishers, Inc., New York, October, 2001, pp 13.

The Proposal Industry Council

A concept for services whose time has come?

By R. DENNIS GREEN

The five Northern Virginia companies that joined to form the first Proposal Industry Council (PIC) have disproved conventional wisdom by showing how small competitor services firm owners can interact for their common good. In this, the first in-depth look at a PIC, we explore its workings, evolving rules, and lessons learned for other would-be proposal industry council creators. The result is a recipe for structuring new proposal business alliances in other regions worldwide.

What is a PIC?

PICuliar

The Proposal Industry Council (or PIC) is a corporate alliance of proposal services companies, all based in Northern Virginia. It is the brainchild of Joseph Nocerino, CEO of a proposal support services company he founded 30 years ago. Nocerino's reasons for starting the council were twofold. First, he anticipated that a regular meeting of business persons with common interests and concerns would be beneficial to all participants. Second, he sought their fellowship.

"Our PIC came together for a couple of reasons," Nocerino said. "One was to explore how competitive companies can work cooperatively. And that's what we focus on. Areas in which we can be cooperative."

Why are these arch competitors embraced and smiling?
The members of Northern Virginia's Proposal Industry Council take a break from their February 2002 meeting. Left to right, they are Elaine Sullivan, Lou Robinson, Barbara Lovelace, Russell Smith, Joe Nocerino, Adrienne Ellis, and Dennis Fitzgerald.

"The other aspect," he said, "is the fellowship that is created. There is a camaraderie built up — a sense of belonging to something beyond yourself. And a sense of making a potential contribution to the industry through sharing of ideas as to how to do our jobs better and be better business people in the process."

The group, first formed in September 2000, has a current membership of seven owners representing six proposal services firms. They are:

- Joseph Nocerino, Century Planning Services, Inc.
- Russell Smith, Organizational Communications, Inc.
- Lou Robinson, Winning Proposals, Inc.
- Dennis Fitzgerald, 24 Hour Company
- Barbara Lovelace, Winning Solutions, Inc.
- Elaine Sullivan and Adrienne Ellis, Technical Quality Management.

One criteria for PIC membership is that members must be companies or partnerships representing more than a solo practitioner. It distinguishes companies from this industry's high percentage of consultants who freelance either full- or part-time.

The PIC's high minded ambitions are reflected in a mission statement crafted specifically for and by the group:

"The Proposal Industry Council is a forum for mutual support, encouragement and idea exchange for its members who are owners and operators of organizations that provide a full range of consulting services in proposal development. Council members, while retaining proprietary interests and not weakening their marketplace positioning, meet at regular intervals to build relationships with one another, provide information to solve problems of mutual concern, share experiences that may benefit other members and discuss best operating practices. They may also, as a group or in one on one relationships fostered by the council, explore the potential to collaborate on client projects or to share resources. The underlying concept of the council is the building of trust, bonds, creating inter-company synergism, and bringing leadership across areas that could benefit our industry, our council, and our customers."

What does that mean in practical terms?

"There are many business issues that we all face as small businesses that we help each other out on," Nocerino said. "Whether they be legal experiences, dealing with accountants, being involved with different kinds of customers, and other challenges that one or any of us may bring to the group." Members bring these issues to the group, describe the issue in generic terms, and ask their associates for advice on what to do.

Overcoming Initial Suspicions

PIC'd On—or—Just Slim PIC'ens

Nocerino's initial attempts at forming the group were met with understandable skepticism. How open could an invitee expect to be with people who owned competitor firms?

Lou Robinson said, "I felt it was unlikely that benefits would justify the time and investment. I had reservations about how much information to share." He decided to go to one meeting, "but I didn't think it was really going to work."

Is it really going to work? Bizzare idea, or an amazing concept?—Let's just give it a try. See what happens.

Barbara Lovelace saw PIC as something between "a bizarre idea" and "an amazing concept," but shared Robinson's suspicions. She recalls Nocerino's friendly persistence. "He sent me an e-mail saying 'Let's just give it a try. See what happens.'"

Nocerino's confidence in the concept was rooted in the experience he had as a founder, facilitator or supporter of similar groups in other business areas. The Executive Club (TEC), for example, is one such entity. It brings regional groups of 8-12 CEOs together nationwide. Nocerino said, "I have also been involved with the Chamber of Commerce running similar groups that were not necessarily CEOs but people who represented different companies and came together, more for collegial support."

"And I've run CEO groups of minority companies," he said. "Again, they were competitors. And at the same time, they were looking to find ways to either work together, be of support to each other, or maybe go after business together. The PIC is very similar to that group."

The skepticism finally dissipated as members grew to trust each other, building individual bonds. "For me, it was when I began the individual meetings," said Lovelace. "Lou and I had lunch. Then Dennis and I had a meeting. Russell and I met in his office. I know Elaine from 25 years back. It happened very quickly," she said, for herself, "within the first two months."

"Gradually," she added, "I came to understand that our mutual dilemmas and issues are more significant than our differences and competitive practices."

The council's viability seems to reprove itself every month. Its potential can only be realized among honorable, ethical parties. "That sense of honorableness," said Nocerino, "can only come from getting to know each other over a period of time. And our experience, not only in this but other areas also, is that once you build a trust level between two parties, you can do lots of things together and expect honorableness in a relationship. And find out that they will deliver on it, too."

The converse could also be true. When asked if the mere existence of and growing participation in groups such as APMP and PIC might be encouraging honorable behavior, Nocerino concurred. "When you have a strong network, the mere word of impropriety, or even the appearance of impropriety, gets around very quickly. So you're going to weed out those who are inclined in that direction. I suspect," he said, "that APMP, like PIC, is contributing to weeding those kinds of people out, and saying, if you're going to behave that way, you're not going to get away with it in this industry because we'll all know about it. And all it takes is one little speck in the soup for nobody to want to drink."

more...

What happens at PIC meetings?

PICy Particulars

PIC meets on the first Wednesday afternoon of each month. The members assemble in a Century Planning Associates conference room. The format is structured, but always variable. It begins with a round-table review of attendees to identify topics for that day's discussion. Each topic or issue is addressed, in turn. Issues that cannot be resolved in one meeting are included in subsequent meeting follow-ups. Time is reserved for special ongoing projects and initiatives of the council.

The issues need not be proposal services specific but often are. Example topics have included:

- Accounting issues — such as those related to system selections, service referrals, employee versus subcontract hiring arrangements, and IRS rules.
- Customer payment/collection issues — such as how to deal with a non-paying client, legal recourse and on-time payment incentives that work.
- Web site issues — such as what design features do and do not work.
- Marketing issues — such as which techniques work best, which publications are best to advertise in, and whether or not surveys are worth performing.
- Legal issues — such as when or when not to pursue legal action and which courts to have the applicable jurisdiction. Also employment law, tax law, and contract labor behavior.
- Resource issues — such as how to juggle limited, available personnel or how alliances between PIC members can solve a member's temporary resource need.

How much detail gets shared is a judgment call made and exercised by each member. The discussions typically revolve around a difficult, costly or perplexing decision. "The member has a decision to make," said Nocerino, "and asks, what would you do? So the greatest value to that person is the advice, pros and cons, back and forth discussion, never telling the person what to do, but giving them enough substance to make a better decision. Good [fully informed] decision making is what many topics revolve around."

Some of PIC's recent discussions have concerned government services. "Only one of the companies in our group does government work directly," explained Nocerino. "We talk about that because others are considering doing government work. Where can we find out about these government opportunities? What kinds of opportunities might be there for companies like us? There is a lot of sharing."

This sentiment is echoed by Smith: "To me the most valuable thing is just the opportunity to exchange information with people that are in the same business," he said. "And every meeting, we learn things, like how you handle an insurance clause. How you staff this, that or the other. It has just been a very valuable experience."

Nocerino likens his "CEO support group" to a "virtual board of directors." But this level of trust is "not something that happened at the first meeting. This is something that progresses as you get to know each other. So as we get to know each other better, the topics are a lot more intimate — business intimate. But at the same time we are competitors, so we do not talk about who our customers are. We do not talk about whom we might be marketing. And we don't share revenue numbers or rates."

Collaborative benefits

PICpocket Privileges

PIC has spawned collaborations and teaming among its members in myriad ways and combinations. Sometimes, two member companies will team to support one client. Sometimes they will simply share information or insights about an opportunity. Sometimes they will refer another member if their own company's resource limitations or a potential conflict of interest prevent them from fulfilling an opportunity that has come their way.

"Joe gave me an opportunity one time, and I am in his debt," Smith acknowledged. He pledges that the favor will be repaid.

Nocerino's pre-PIC collaborations were actually the precedent. As he explains it, Century "had experience with one or two of the companies that are now in the PIC group whereby their customer needed a service that they did not provide and we did. [The other services company] asked us to come in and take care of their customer with the understanding that there was nothing we would do to take their customer away from them. So what we did was extend their service capability — it was under our name, but it was still their customer," Nocerino said.

Nocerino then wondered why this could not be done with other, similar companies. In the first instance, according to Nocerino, it worked "because we had known this one company for a long period of time and had built up a mutual trust and mutual relationship. And we said, well, can you do that with more than one company? We knew there were five to seven companies of our size in this area, so an invitation went out to all of them. Everybody invited came to the first meeting. And as we learned of more companies, we began defining rules for how the council could grow. Since we really share lots of personal information, the ground rule was established that any one company currently in the council can have veto power over a new company's acceptance. When a new company wishes to learn more about the council, that company's CEO is invited to a meeting. That new company makes a decision as to whether it wants to join us. And the people who are already in PIC make a similar decision. If the two decisions align, then we have a new member."

New growth, directions and dreams

The Once and Future PIC

In recent months, PIC has expanded its focus on outreach, education and promotion by looking for opportunities to address and interact with the business community at large. The first tangible result of that outreach will be a group presentation by PIC to the Northern Virginia Technology Council in coming months. PIC is scheduled to address that council's Emerging Business Networks group, an audience of 100-150 businesses, on the subject of pre-proposal planning.

The initiative promotes every member of PIC at the same time it promotes the professionalism of proposal management, and the proposal services enterprise. Nocerino is careful to point out that such initiatives are not in competition with those of APMP, but complementary. All PIC owners are also APMP members. They are currently exploring ways that the two organizations can take a collaborative approach.

PIC also entertains prospective new members. If other qualified entrepreneurs in the Washington, D.C. metropolitan area are interested in joining PIC, those parties are invited to talk to any member of the current PIC group.

In addition, PIC is reviewing business opportunities that it can pursue and team on as a group. The members reason that their combined resources allow them to bid on projects of unlimited size or duration. Whether they bid as PIC or through an individual PIC member, they can multiply their individual corporate resources by a factor of four or five times.

In this context, more than one member expressed reservations about how far the group's cooperative initiatives can eventually extend. Robinson, for example, noted that "even under the new relationships, there is a limit on how much information can be shared without compromising my company's competitive position. The greatest immediate challenge is to perform work together using combined resources. Up to this point there has been no money involved. [No money has been put at risk.] When that does occur, it may bring out [member's] greed."

Does PIC see a day when its resources and interests will grow to encompass lobbyists that influence procurement-related legislation? The answer, in a word, is no. The better answer is offered by Lovelace: "We would like to influence the [release] dates of the RFPs."

Is PIC a repeatable concept?

Envision a Peck of PICs

All the PIC members view the formation of their council as a repeatable concept and one that proposal services companies should consider in any metropolitan region that currently supports more than one services company.

"Certainly it's a repeatable model," said Nocerino. "There's nothing peculiar about this Metropolitan Washington region that made it work, or about these particular companies."

Among the lessons learned he lists (see inset) is that "When you're inviting people, you take a chance. Be sure, when inviting your first couple of people, your so-called initial core group, that you've got a pretty good chance that they like each other and know each other well enough to want to work cooperatively. Because when you bring everybody together for the first meeting, everybody will be looking at each other thinking 'What the hell am I doing here?' and 'You're my competitor!'"

Or, as was the case with other company owners looking at Nocerino, they wondered, 'What is the hidden agenda?'

"So you've got to dissipate all those natural reactions," Nocerino reflects. "The easiest and quickest way to dissipate them is by bringing people together who kind of know each other, maybe through other organizations that have worked together before, one way or another, to almost have — not necessarily a deep trust — but to have the elements of trust in place. It's comparable to professional meeting planners who talk to everyone before the meeting to make sure that the agenda of the meeting goes through smoothly," he said. "Set yourself up for success."

Speaking as an early invitee, Dennis Fitzgerald points to the importance of strong PIC group leadership. Specifically, he points to Nocerino as the unifying influence he witnessed in the launching of this first PIC. "That [leadership] really helped solidify the group," said Fitzgerald. "The idea that there's a place, every month, where we can go because one of our members has made that space available. That someone has taken it upon him- or herself to keep the lines of communication open outside the meeting. It's also important that, in the beginning, Joe did a great job of selling us on the idea of coming together. He said, 'Why don't you come once.' After that, you did find there was some commonality. Someone had a problem like you had. Had some insights that were useful. But it would have been harder to [solidify] the group without someone taking that leadership role."

The value of a forward-looking focus is emphasized by member Elaine Sullivan. If a group's focus is too narrow, concerned only with mundane problems, member interest is bound to wane. "The group really needs to move forward," she suggests, "on some kind of a project to keep everyone's interest level high." She credits Nocerino with initiatives such as the Northern Virginia Technology Council presentation and surely has Nocerino in mind when she adds that, "For this type of group to get started, it takes a doer, not a talker."

Lovelace's overview of recommendations seems consistent with those of other members: "To ensure success," she said, "I'd recommend a small core group convene to establish rapport, agree on a mission statement, begin to trust each other, and work over several months to build relationships and helpful networks with each other. Individual members should also be in touch outside the meetings for lunch, visits to each other's offices, and other 'getting-to-know-you' events. It is important to have a leader who follows through on meetings, keeps in touch with everyone, invites only company principals to visit meetings when other members have no objection to those individuals, and encourages dialogue among all at meetings. An informal meeting structure seems to work best, with a general sharing of reports on progress, problems, and discussion of forthcoming activities. A mutual proj-

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Starting Your Own PIC?

Some LESSONS LEARNED

Northern Virginia's PIC members share their insights for ensuring a new PIC's success:

- **Start With Strong Leadership**—Identify someone impassioned to facilitate a start-up, take the lead, coordinate meetings, follow up with members, and keep a positive perspective on what can be accomplished and how.
- **Pick Compatible Core Group Members**—When inviting your initial core group, start with people whose previous relations and demeanor suggest that they will like each other and work cooperatively. Then build gradually.
- **Favor Proposal Services Specialization**—Favor member companies who share your focus on supporting customers for competitive proposal development. If proposal support is not their core business, their level of interest will not match your own.
- **Make Full Group Approval a Requisite for Adding New Members**—Unanimous choices help to ensure a PIC's success.
- **Build Long-term Interest Through Council Outreach and Special Joint Projects**—Particularly projects that promote your members and the professionalism of the proposal management industry in front of other business groups.
- **Limit Participation to Owners**—Insist on owner-only participation in the monthly meetings. Senior managers or subordinates won't do.
- **Commit to Attending Every Meeting**—Set a meeting schedule and stick to it. An occasional absence or conflict is to be expected, but full participation and continuity are critical to ensuring the PIC's viability.
- **Informality Works**—Although some PIC initiatives (such as a group presentation) may require formal planning, agendas and action item lists to ensure efficient completion, the balance of personal and decision-oriented issues discussed in confidence by PIC members will not. In fact, members may prefer that their issues not be recorded. So don't kill monthly meetings with formality. If minutes are taken, do not distribute; simply file securely as a courtesy to the group.

ect is a great way to get the group going and keep it strong."

How PIC members view their world

PIC Perspicacity

Current Business Trends. Finding this assembly of seasoned proposal services firm owners all in one place, it was inevitable that discussion would veer towards analysis of current business trends. How are proposal services companies faring? How have recent world events effected what they do?

Several in this group perceived that the overall number of proposal services companies has diminished since seeing highs in the 1980s and 1990s. "As of late," said Nocerino, "a lot of companies are using people that they would otherwise have to fire. And they're using more in house resources. Plus, client companies are becoming more savvy, wanting a proposal services entity that they can go back to over and over again—a services firm that becomes, almost, an extension of their company. That is true for a lot of our customers, some of which go back 20 years. We've been supporting them longer than most of the people in the company," he said. "One company I have in mind has turned over owners three times in that period. We're their continuity factor," he added. "Their corporate memory resides with us."

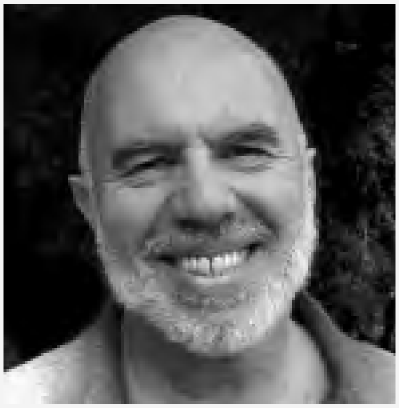
How is the proposal services business changing, if at all?

"That's a hard question to answer because of [recent world events and] the changing economy," said Nocerino. "Getting new business is more difficult. Before this last period, more and more client companies were appreciating and seeing the value of bringing in professionals, as opposed to an employee they just draft from the field to put a proposal together. Clients also saw the value of bringing in contractors as opposed to maintaining and funding a large staff and overhead all year long. The business was enjoying an upswing with clients using more outside services to put proposals together."

Mid-year Upswing for 2002. When first interviewed in February, all the PIC members were hopeful that rumors of an imminent new upswing would prove true. A follow-up in April indicates that all firms are very busy again. Their optimism is summarized by Smith: "The consensus," he said, "is that business this year is going to be better than last year. The further expectation is that, based especially on a large increase in IT spending next year, business is going to be better in 2003 than it was in 2002."

Smith's perception is shared by Lovelace, but Robinson offers more cautionary thinking: "I believe in the long run that Federal Government business will be reduced as a function of more blanket contracts being procured and issued (IDIQ, GSA, and others). This will be somewhat offset by new Government initiatives in areas like security," he said. "On the commercial side, I think there will be a revival in the communication sector and parallel growth in proposal activity for this group. Bottom line, I think the

PIC Membership



Joseph Nocerino

CEO and Founder
Century Planning Associates, Inc.

Business: Full life cycle of competitive proposal services, from lead identification at the front end to project execution/implementation at the back. Also provides training program development and temporary to permanent, proposal special placement. Founded 1972.

Other Interests: Planting and seeding, orchids, small group dynamics and psychology.

Favorite Quotes: "You tend to replicate the models you're around whether you like them or not." And, "If you control the language, you control the conversation."

Elaine Sullivan and Adrienne Ellis

Founders (President and Vice President)
Technical Quality Management

Business: Publications placement agency for writers, editors, proofreaders; all people tested, screened and guaranteed. Founded 1997.

Other Interests:
Golf for Sullivan. Oil painting, reading, sports and travel for Ellis.

Favorite Quote (Sullivan): "With God all things are possible."

Favorite Quote (Ellis): "United we stand, divided we fall."

Barbara Lovelace

President, Winning Solutions, Inc.

Business: Management, writing, orals development and coaching, and publications support across the proposal life cycle. Small corps of 60 specialists serving IT customers. Founded 1988.

Other Interests: Living history interpretation, boating and fishing, genealogy, fitness, and church.

Favorite Quote: "Nothing changes if nothing changes."

downward Government trend will outweigh the upward commercial trend and proposal activity in total will diminish."

A Viewpoint on Methodology. What proposal development methodologies do the seasoned PIC company members follow?

In the case of Century, Nocerino's company evolved a Proposal Perfect™ process when they started in the 1970s. "Our basic system has always been a sequential process," Nocerino said. "In other words, you put the first block in, you check it. You put the second block in, you check it. So you're constantly doing your own quality assurance as you go along. The change today," he said, "is much more emphasis on graphics. Much more emphasis on the cost proposal when we're allowed to participate and making the cost proposal a selling document." His firm has also de-emphasized training. "We don't promote it in large groups because we know that the retention level is very low, and we think it's a waste of money to do that. What we do do is just-in-time training while we're doing a proposal. What is a theme and how to write one? What is a discriminator? How do you make it powerful? Things like that."

He adds that "We do a lot more orals today than we've done before, but that's just the nature of things. But the basic, the basic elements of our process go back to when we started. In the '70s, there was storyboarding. We never liked storyboarding because we felt it was too cumbersome, too clumsy, and so we've come up with a process that, when you look at it, you'll say, there's nothing that unique about it. It's an amalgam of what everyone else is doing out there. But it is a very systematic, disciplined approach."

Lovelace added that, "We each have methodologies and tools. My view on methodology is as follows: Everyone who works with us has received training in various methodologies over the years and uses appropriate pieces of each methodology, adapting them to the client environment, resources, and needs for each engagement. Two tools we use to implement customized proposal methodologies are writing templates (as opposed to storyboards) and a specialized version control system we have perfected."

Are there other processes out there that work? "Yes, I'm sure," Nocerino said. "And many companies that we go into have their processes, and we follow them, though we make suggestions as we go along."

On Realizing the PIC's Potential. Everyone recognizes the council's potential. They also recognize how little of that potential has yet been realized. As Lovelace said at their meeting in February, "We are a work in progress."

"We're still trying to figure out what we're about," said Robinson at the same assembly. "That definition is still sort of rolling, and it's not done. We're not at the mountaintop yet."

Queries for and about PIC can be made to the group through Joe Nocerino at jtn@centuryplanning.com.

R. Dennis Green is a management consultant, writer and proposal practitioner with 20 years experience. He is Managing Editor of *Proposal Management* and was founder and first president of APMP's National Capital Area chapter. Email: rdengreen@aol.com

. . . . at a glance

Russell Smith

President
Organizational Communications, Inc.

Business: Full-service proposal consulting. Whole proposal development, staff augmentation, off-site proposal facility, training, full-time staffing. Database of 9,000 associates. Founded 1985.

Other Interests: Playing piano.

Favorite Quote: "To the victor goes the spoils."

Lou Robinson

Executive Vice President
Winning Proposals, Inc.

Business: Personnel support services for proposal development and production. A "Ma/Pa operation." Also offers Temp-to-Perm contracts. Founded 1989.

Other Interests: Daily racquetball, motor home travels, vacations on Cowpasture River.

Favorite Quote: From Harry Truman, "The Buck Stops Here."

Dennis Fitzgerald

Managing Partner
24 Hour Company

Business: Visual communications solutions in graphic design, animation, interactive multimedia, document publishing, and proposal support. Founded 1993.

Other Interests: Reading, working on business ("my business is business, my hobby is business"), vacations in Outer Banks, time spent with wife and 2-year-old son.

Favorite Quotes: "No Job is Too Big, No Fee is Too Big." (Bill Murray, *Ghostbusters*);

"If there is nothing very special about your work, no matter how hard you apply yourself, you won't get noticed and that increasingly means you won't get paid much, either." (Michael Goldhaber, *Wired* Magazine)

Article

Computer Security From A Proposal Perspective

The problem with computer security measures is that you may never know if they are too much, but (if you are lucky) you will never find out if they were not enough.

By TOM CAVANAUGH

In this article I suggest various security measures that you may or may not have considered, accompanied by arguments for instituting them. That does not mean that they will fit well into your existing security provisions, but if my argument makes you review your current situation, I hope you will agree that reading this article was time well spent. I will be using specific examples from within Microsoft Windows operating systems (OSs) and Microsoft Office applications, but the underlying threats, security measures and countermeasures apply to any platform, OS or program. If you have surrendered control of your Information Technology (IT) resources to someone else, then some of this will sound pretty foreign. If you retain control of your IT resources and some of this still sounds foreign, you are in trouble.

Threats to proposal security fall into three main categories—Benevolent Threats, Indifferent Threats, and Malevolent Threats

The threats to proposal security come in many forms, but fall into three main categories: Benevolent Threats, Indifferent Threats, and Malevolent Threats. A discussion of each follows, along with steps you can take to prevent, or at least minimize, their more catastrophic effects.

Benevolent threats are the threats that can be carried out by well-intentioned people in your own organization and, due to a

combination of circumstances, result in data loss or corruption. This is why you do backups. Ideally, these kinds of events would not occur at all, but I am sure you will agree that is too much to hope for. However, with the use of appropriate tools and configurations, the damage caused by these kinds of threats can be minimized.

Indifferent threats are the threats that exist because… well… because. To computers, the world is a hostile place, so in this section, I will discuss various ways that you can minimize the impact of these threats on your systems.

Malevolent threats are the threats engineered by outside organizations to compromise your proposal, either to their advantage or to your detriment. Yes, a less competent competitor could benefit from reading your proposal, but an equally competent competitor could also benefit by impeding or misdirecting your efforts.

Benevolent Threats

"Lord, protect me from my friends; I can take care of my enemies."

Voltaire

The vast majority of security problems are caused, either directly or indirectly, by people within your own organization. I am not talking about malicious attacks by disgruntled employees or covert operations by moles. I am talking about mistakes by people you already trust and that you may continue to trust. You should institute security measures that minimize the likelihood and impact of these mishaps.

Setting Up Your Network

First and foremost, your workstations should only have the operating system and applications on them. They should be configured to store all data on a server. This makes workstations easily replaceable, while maintaining the security of your proposal. In a peer-to-peer networking environment, data can be anywhere and everywhere. When it comes time to assemble the entire proposal, you may find yourself struggling to determine which file from which computer you should include. In any large project, peer-to-peer networking allows too much flexibility and too little control. To keep things manageable, you should set up a client-server network.

Setting Up Your Server

Microsoft Windows NT Server and Windows 2000 Server can operate in either of two modes: as master of a domain or as a server only. A domain permits the server to control access to its resources by users via any workstation. Without a domain, the server relies on the workstations to determine who has access. When one of the workstations is removed from the network, the security provisions it contains are lost. Likewise, if a new workstation is added, it contains no security provisions. I vote for the domain.

Microsoft Windows NT Server and Windows 2000 Server can both support multiple network protocols, but only Windows NT Server can create a domain on any network protocol. If your local area network (LAN) will be connected to a wider network or even to the Internet, your workstations and especially your server should use a protocol that the rest of the network does not use. For instance, WinNT Server can create a domain using any of the NetBEUI, IPX/SPX or TCP/IP protocols, but Win2K can only create a domain using the TCP/IP protocol, the same protocol that the Internet uses. If your LAN is connected to another network, using a protocol that is not used elsewhere makes you server invisible to anyone outside your LAN. Why put a door where you can have a wall? I vote for WinNT Server with NetBEUI.

But wait! A Windows NT Domain Controller using the NetBEUI protocol is available on the network to workstations running NetBEUI under either Windows 98 or Windows 2000 Professional, but not Windows XP. Also, Win2K Pro and WinXP Pro have provisions for storing user settings on a server, so that any user can use their own settings on any workstation. This is called Roaming Profiles, and Windows 98 does not support it. I vote for Windows 2000 Professional.

With every revision of the Windows operating system, Microsoft makes the outside world more and more accessible to your computer. But in doing so, it also makes your computer more and more accessible to the outside world. This is not what you want!

Setting Up Your Workstations

All versions of the Windows operating system create a directory called "My Documents" in the root directory of the system drive (the drive containing the operating system). Most programs will use this directory to store files, but you should store files on the server. There are two solutions to this problem. You can edit the preferences for each and every program, changing the preferred file location to a directory on the server, or you can use TweakUI to do the same thing once and for all.

TweakUI is a utility that allows you to modify many of the settings within the operating system, and is available free from the Microsoft Web site. To have all programs store all files on your server by default, create a new directory (like, maybe, "Our Documents") in a shared directory on the server, run TweakUI, click on "My Computer" and under "Special Folders" change the location for the folder "My Documents" to the directory on the server. This will change the default file location for existing and future programs.

But that is not enough. Spreadsheet and graphics applications load an entire file into memory in order to manipulate the document it contains, but database and word processing applications leave most of the file on the disk and only read the portion of the file to be displayed and edited. Because database files contain regular and consistent data, database applications can usually recover good data from bad files. Word processing files are much more complex, however, and you should make every effort to use the features of the program that increase the chances that you can recover your data. In Microsoft Word, on the "Tools" menu, select "Options…" and click on the "Save" tab.

Never allow fast saves—it creates very large files that are very difficult to restore or recover

You should always create a backup copy. This option creates a backup copy of the file as it was before Word opens it. Also, you should never allow fast saves. This option creates very large files that are very difficult to restore or recover. You should also allow background saves and save AutoRecover information periodically. The AutoRecover option allows you to pick up where you were

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before something went wrong. Also, you should change the location of the AutoRecover files to a directory on the server, just in case whatever went wrong caused an unrecoverable error or an error that would take too long to recover from. If the AutoRecover file is on the server, then you could move to another workstation and pick up where you left off. You can modify this setting on the “File Locations” tab of the same “Options…” dialog box.

Backing Up

There are lots of ways to back up. I recommend all of them.

The most important thing about backing up is restoring. If you cannot restore then you have just been wasting your time. Before you have to restore something you need, try restoring something you do not need. Make a copy of a small directory, back it up, delete it and try to restore it. It is simple, it does not take very long, and you will know for certain that you can do it if you have to.

You can do backups onto two different kinds of media. Tapes have high capacity and low cost per megabyte, but are slow and less reliable. Rigid media (i.e., hard disks, optical and magneto-optical disks) are faster and more reliable but have limited capacity and cost more. But you do not have to choose between them; use both kinds.

Most tape backup software can perform unattended backups and are more likely to successfully back up files that might be in use. So use tapes for your routine backups, and backup onto CD-ROMs or DVD-Rs whenever your proposal reaches a significant milestone and you can lock everyone out of the files you want to backup. You should back up as often as you can, and only bother using the verify option if no one is likely to be editing anything while the backup is occurring. When you are getting down to the wire, you may very well have people working long hours, maybe even around the clock.

Create your backup jobs so that you do a full backup and verify of your entire server every night at 2:00 A.M., for instance, and do a full backup (without verify) of only the shared directories during the lunch and dinner hours. And always eject the tape after the backup job is completed. A tape sticking out of the server will be an indication that a backup job has completed successfully, and if you do not have a tape sticking out of the server, find out why!

Also, most tape drives include a hardware compression option that will compress the data before storing it on the tape. If you choose to use this option, then if your server or tape drive fails you may only be able to read your tapes on a drive from the same manufacturer. Most tape backup applications include a software compression option, and it is far more likely that you will be restoring using the same backup software than the same manufacturer’s tape drive. I vote against using hardware compression.

Another thing to consider is the inherent unreliability of flexible media; the more often you use a tape to back up, the less likely you will be able to use it to restore. I suggest that you do not use a single tape more than 25 times or longer than 2 years. You might consider that as overly cautious, but some organizations backup to a tape only once and then lock it up in a fireproof safe, preserving it for when it might be needed to do a restore. I do not consider that overly cautious.

Make the secure choice as easy, as simple, and as fast as the non-secure choice—If you do not, you have less than a 50-50 chance of remaining secure.

People

You need to develop and institute simple procedures for everyone to follow. These procedures must be just as simple and easy as circumventing them might be. If they are not, some people might start developing their own little shortcuts, especially when the pressure starts building. When these people start passing their shortcuts on to others, you are really in trouble. Remember, you must make the secure choice as easy, as simple, and as fast as the non-secure choice. If you do not, then you have less than a 50-50 chance of remaining secure.

Indifferent Threats

“Never place a period where God has placed a comma.”

Gracie Allen

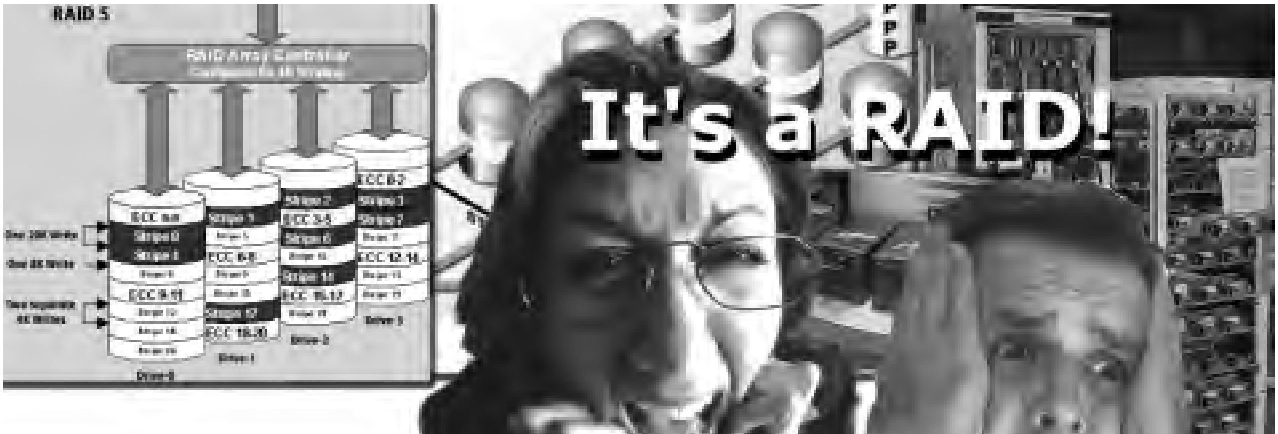
Computers are designed to operate in a typical office environment, but no office environment is always typical, and nothing lasts forever. Benevolent and malevolent threats exist because of people; indifferent threats exist because of the environment. In the battle between people and the environment, people lose every time. Do not tempt fate with your proposal.

Physical Security

This is simple, but it gets overlooked way too often. Is your server on a table or desktop where it could fall off or be knocked down? Is it on the floor where it could be kicked by passersby or pounded with a vacuum cleaner by the cleaning people? Could something heavy fall on it? Is it near the coffee maker? Is it under a sprinkler head? These are some of the questions you should ask yourself when you decide where to place your server.

Electrical Power

Each workstation should have an Uninterruptible Power Supply (UPS) to protect the computer against power failures. I recommend a Line-Interactive UPS, which adds a voltage regulator to the battery backup, but anything is better than nothing. And, yes, a UPS includes a surge protector and line noise filter.



The important thing about selecting a UPS is getting the right size. Add the amount of current, in Watts, that each device draws, and multiply the result by 1.4. The result is the smallest UPS in Volt-Amperes (VA) that you should use. For instance, a computer with a 200-Watt power supply draws (Surprise!) 200 Watts. A Typical 17 inch monitor (Do not forget the monitor! How will you save your work if you cannot see the mouse pointer?) will draw about 120 Watts. Multiply the total, 320, by 1.4, and the smallest UPS you should use is 450 VA, which will give you between 5 and 15 minutes of reserve power for you to save your work, log off, and shutdown the computer. If you use a smaller UPS, in addition to not lasting long enough, you could damage it by drawing too much current too quickly.

> **volt-ampere**
> VA is a unit of measure. For computers, Volt-ampere (VA) is a measurement of power in a direct current (DC) electrical circuit. In a DC circuit, 1 VA is the equivalent of one watt (1 W). The power, P (in watts) in a DC circuit is equal to the product of the voltage P (in volts) and the current (in amperes)

Servers are different. At the very least, servers cannot start shutting down until all the workstations have saved their work and logged off, so figure out how big a UPS the server needs using the same technique as for the workstations, and then double it. For instance, a server with a 350 Watt power supply and a 15 inch monitor might need as much as a 1250 VA UPS. Also, if a power failure occurs while the server is performing a backup, you might want it to finish, so you might need an even larger UPS.

And do not forget a UPS for your network equipment. It would not do much good to have your workstations and server operating in the dark if the network hub has no power.

Hardware

Most of the components of a computer are electronic. The least reliable component of a computer is mechanical: the hard disk drive.

RAID (Redundant Array of Independent Drives)[2] was developed by the University of California, Berkeley, in an effort to improve the performance and reliability of hard disk drives. RAID is available in different configurations, each with its own advantages and disadvantages. RAID 0, often referred to as striping, uses two drives, each of which stores half your data. This is twice as fast as a single drive, with twice the capacity, but because the failure of either drive will result in the loss of all data, this is only half as reliable.

RAID 1, often referred to as mirroring, is two drives, both of which store all your data. This offers no speed or capacity advantage over a single drive, but because both drives would have to fail for your data to be lost, this is twice as reliable. RAID 5 is a compromise between RAID 0 and RAID 1. RAID 5 uses multiple drives to increase speed and capacity, but includes an extra drive that stores redundancy data. This means that any one drive in the array could fail and you would not lose any data.

For instance, if you had a RAID 5 array of three drives, it would have twice the speed and capacity of a single drive, and if any one drive failed, your data is still safe. If the redundancy drive failed, you would still have all your data. If one of the data drives fails, the redundancy drive could fill in for it, and you would still have all your data. (It is actually much more complex than this, but a more detailed description of how RAID 5 works would be superfluous for the purposes of this article.)

Since RAID 5 has built in redundancy, people tend to include several drives in the array, and that is not such a good idea. If one of the drives fails, and a second drive fails before you can replace the first failed drive, then you have lost all your data.

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editor's note:

If you enjoy computer hardware complexity, or, if you would like to see how complex it gets, one of the best technical comparisons we found on the Web is a Lister Hill National Center for Biomedical Communications white paper presented at the Fifth NASA Goddard Conference on Mass Storage Systems and Technologies.
Is the Bang Worth the Buck?: A RAID Performance Study
Susan E. Hauser, Lewis E. Berman, George R. Thoma
Sept. 17-19, 1996, Vol. 1, pp. 131-140
URL: http://archive.nlm.nih.gov/pubs/bangbuck/bangbuck.php
Updated February 13, 2002

The more drives you have in your RAID 5 array, the greater the chances that two drives will fail. More drives will increase speed and capacity, but will decrease reliability. I vote for a three drive RAID 5 array.

Also, clean the heads on your tape drive once in a while.

Software

I am not going to get into a long discussion about which operating system is the most reliable. However, I will say one thing on the subject. I have one computer that I can boot up into any operating system by swapping the system drives. Each operating system is configured to run all the applications and use all the devices and peripherals available on the computer. The least reliable of the three versions of Windows I use is Windows XP Professional. Do with that what you will.

Today's operating systems are tremendously complex beasts; it is surprising that they work at all. Anything you do to add levels of complexity to an operating system will undoubtedly reduce its reliability. Even if some small piece of software might provide you with some useful function that is not available by any other means, I strongly suggest that you refrain from installing it.

Use the power saving features of Energy Star monitors, but forget the screen savers; they do very little good and too much bad.

Screen savers are not necessary; your screen does not need to be saved. Monitors do not burn in. Color monitors never burned in, and monochrome monitors do not burn in anymore. So do not install screen savers on your workstations and especially on your server. Screen savers, especially those complex 3D graphic screen savers, can use a lot of CPU cycles that you could probably put to better use. Some people might also believe that the use of screen savers protects the computer from casual intrusions, but it would have to be a very casual intrusion. The security loopholes associated with screen saver passwords have been well documented as have the reduced reliability of Windows operating systems when using screen savers. By all means, feel free to use the power saving features of Energy Star monitors, but forget the screen savers; they do very little good and too much bad.

Viruses

A well-written virus (of which there are very few) just spreads. So what?

A badly written virus (and this encompasses the vast majority of viruses) in addition to spreading, compromises the integrity and reliability of your operating system and applications with its own bugs.

Anti-Virus applications are made up of two separate programs. One is the program that occasionally scans every file on your system looking for files that contain viruses. This is a good idea. The other is the program that starts up with the operating system, and monitors what the computer is doing, looking for the kinds of things that viruses do, and tries to stop them. If it always worked, this might be a good idea too. It does not, so it is not. Full time virus protection consumes memory and processing power that you could probably make better use of, especially if your system is in a high security environment already. If you have instituted some of these precautions, you probably do not have to worry about viruses very much.

Network Security

Connecting your LAN to the Internet subjects your workstations to cookies, poorly written web browser add-ins, and SpyWare[3]. Both Microsoft Internet Explorer and Netscape Navigator, by default, accept downloads unquestioningly. While most of us are willing to tolerate these dangers, or are unaware of them, these threats compromise the integrity and security of the proposal.

If you have to connect remote locations involved in the proposal development process, use a point-to-point link (a direct communications link, like a T1 or other leased line), unless one of the locations is connected to the Internet. If one location is connected to the Internet then a point-to-point link will compromise other locations as well. If you need to work in this environment, connect all the locations to the Internet and use firewalls (for general security) and VPN routers and concentrators (for secure data transfer between locations through the Internet).

Malevolent Threats

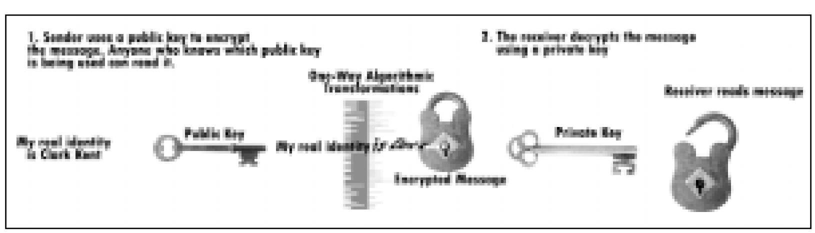
"Power is not only what you have but what the enemy thinks you have."

Saul Alinsky

Controlling Access

This means controlling not just the people going in and out of your secure areas, but the proposal too. And if the proposal does not leave your secure areas, how will you restore your proposal in a new location if you cannot use your old one?

Your backup media contain all your data (at various stages in your proposal development). Keep them as secure as anything else that might contain your proposal.



The University of Washington has an excellent article on encryption technology at its Web site. See the following URL if you would like to read more about encryption: http://www.washington.edu/computing/windows/issue22/encryption.html

Passwords

If at any point the security of your entire operation relies on a single password, then you are in trouble. Passwords, and even username-password combinations, are notoriously easy to crack[4]. If you must transport your proposal through a non-secure medium, use a public key encryption scheme to secure it. There are a number of excellent programs that will encrypt files using public key encryption, not the least among them is the line of PGP products.

Public key encryption schemes use a password called a private key, sometimes a password of your choosing, to create a public key. You tell other people what your public key is, and they can use it to encrypt files that can only be decrypted with your private key. No one can determine what your private key is, even if they know your public key, so files encrypted in this way are as secure as you can make them.

Do not rely on the password provisions within applications to maintain the security of your proposal. These and other popular password schemes like those in ZIP archive file utilities are also notoriously easy to crack.

Smart Cards and Biometrics (face, fingerprint, iris and retinal scanners and voice-print identification analyzers) are not necessarily the answer either. Both produce a considerable amount of false positives and false negatives, and if the device fails you may not have the time or resources to fix it. For the most part, they add levels of complexity to an operating system and will undoubtedly reduce its reliability.

No Wireless Networks

The security weaknesses of wireless networks have been widely publicized[5], so I will not restate them here. Suffice it to say that a wireless network broadcasts your data to the surrounding neighborhood. Does that sound like a good idea to you?

No PDAs or Laptops

Leave your proposal on the server! You need to decide how the proposal and supporting data leaves your secure areas. PDAs and laptops allow anyone to cart your data around, and make it easier for someone to steal.

No Windows

Yes, that's right: No Windows!

Do not use a computer in an office that has a window. It does not matter if you close the blinds and draw the curtains. The cable that connects your monitor to your computer emits a signal that can be detected and recorded. That signal can then be used to reproduce the image that appears on your monitor. If you do not want other people to see what is on your monitor, keep your monitor in an interior office.

On the other hand, if you want to do some misdirection…

Closing Thoughts

"The man who views the world at 50 the same as he did at 20 has wasted 30 years of his life."

Muhammad Ali

You need to implement the same security measures for all your proposal efforts. If your competition sees you implementing tighter security, they know that what you are working on is more valuable to you, and therefore, it is more valuable to them. The difference between a shoplifter and a jewel thief (or an Enron executive) is the value of the prize. If you always keep your guard up with the shoplifters, the jewel thieves will not know where the most valuable prizes are.

Everything must be both redundant and secure. That includes you.

Tom Cavanaugh has been a computer professional since 1980. He worked as an analyst for three defense contractors before starting his own computer consulting company in 1986. His company develops reliable secure networks for clients in various industries. He can be reached at tomc@tc-solutions.com.

Footnotes:

[1]For Windows 98, Me, NT, and 2000, go to http://www.microsoft.com/ntworkstation/downloads/PowerToys/Networking/NTTweakUI.asp. For Windows XP go to http://www.microsoft.com/windowsxp/home/downloads/powertoys.asp

[2]For a more thorough explanation of RAID, visit the Web sites of either Advanced Computer & Network Corporation at http://www.acnc.com/04_01_00.html or Finite Systems Ltd. at http://www.finitesystems.com/PRODUCT/raid/raid.htm.

[3]SpyWare are programs that sneak into you computer, keep track of what you do, and report back to a host on the Internet, possibly messing up your computer in the process. For more information about SpyWare, visit http://www.cexx.org/problem.htm.

[4]Larry Jay Seltzer "Password Crackers" *PC Magazine* Feb. 12, 2002

[5]For information on the security weaknesses of wireless networks, search the topic online through ZD Net News at: http://zdnet.com.

Article

Proposal Production

A Primer On Quality Drivers, Lead Times and Production Task Scope

When you schedule for proposal production, your enhanced desktop publishing capabilities may lead you to underestimate production requirements for a medium-to-large size proposal. Consider more lead time for intense, special-skill, phased activities, and pay close attention to supplies and equipment.

By SUZANNE KELMAN

Enhanced desktop publishing capabilities can lead your proposal planners to underestimate the true production requirements for a medium-to-large size proposal. A well-meaning planner, for example, might schedule a few days for proposal production, thinking that is enough time. But if your project calls for multiple printed sets of a several hundred page color proposal and accompanying hyperlinked files on CD-ROM, you may need to incorporate more lead time for intense, skilled, phased activity, and pay close attention to supplies and equipment.

There is an ever-increasing level of sophistication and quality expected by the customer in competitive proposals. Many established larger companies are well equipped to meet this demand. In fact, it is these very companies that are pushing up the quality standard to create a competitive edge.

For smaller companies trying to compete in this environment, one of the aspects of proposal efforts often overlooked is the degree of resources and time required to meet this demand. This article outlines some factors to consider when producing a high-quality proposal.

Involving the production team during each phase of a proposal development effort, from RFP analysis, through storyboarding, to publishing review sets and the final proposal, alleviates critical time crunches for your entire team. Phased interaction will unmask the myth of the rapid turnaround miracle and its unrealistic presumptions. More important, it will educate team members about the complexity of production activities and their interdependencies with other tasks.

Don’t Lose Out Because of “Too Late...Too Little”

Proposal management professionals know that high stress for the proposal team is standard. The overall goal is to produce content-rich pages at the highest quality possible. Delayed production activities may cause extreme deadline stress and risk quality to salvage completion. Absolute print-time constrains any proposal schedule. Insufficient preparation for redundancy should equipment fail, or for skilled production tasks, can add additional pressure to the process.

Begin production activities early in the game. Response format instructions — like minimum point size in graphics and text — impose challenges in a page-limited proposal. At first, authors may not know what graphics they will need, and may start to draft text before submitting their drawings. An author may sketch a drawing for a quarter-page graphic, only to discover that the font size limitation pushes the final art to a half-page graphic, incurring several days of development cycling to distill the detail.

On a small proposal, one skilled production person may be enough for the job. On a larger proposal, one person may be inadequate. Underestimating production person power delays production tasks and risks a resource crunch. Producing a single component of a large proposal, such as a single volume, can be a full-time production job for at least one person.

While your graphic artist may spend several days developing graphics for a section, other tasks requiring a variety of skill sets need to be done at the same time. Your proposal may need a word processor, a graphic artist, an editor, and a media production specialist. Each must be aware of the response format instructions. An early start, reliable resources and a skilled team ensure a high quality result.

Plan for Efficient Production, Scheduling, and Management

There is no such thing as a standard proposal. Identifying activities in general phases: Infrastructure, Staging and Publishing, will generally cover most proposals. Each phase includes different tasks, as summarized in the overview table (see page 24). Some phases must overlap and truncate to meet your proposal deadlines. Generally, production Infrastructure and resources are in place as early as possible. A draft RFP may indicate some production requirements, which facilitates Staging the proposal. Your entire proposal team stages the proposal, and develops text and graphic responses in edition cycles. The Publishing phase follows staging (development), when publishing requires physical media.

The Right Tools...Consider Equipment and Technology Investment

Memory—High quality production requires the best equipment and production technology available for a proposal. Servers and Personal Computers (PCs) with plenty of hard disk space and memory (such as RAM or SDRAM) protect the proposal and production effort. The rapidly falling cost of memory should ensure that each production PC has at least 512 Mbytes.

Software—Competitive proposals demand data-rich pages and artwork, requiring full-scale word processing and graphic software tools to create them. Limited word-processing and graphics software risk quality, and full-scale software packages, such as Microsoft® Office, JASCTM and/or Adobe® tools are a valuable investment.

Consider software compatibility issues. For example, inserting or copying some graphic file types into word processing applications may corrupt their visual properties or printed appearance. Select and test compatible software and file types early enough to ensure desired results.

In addition, color results tend to vary between software applications. Color correcting is time consuming, but necessary when using a customer identity, such as a logo. Who would bid to McDonalds using a logo with the incorrect "golden arch" color, or to Coca-Cola™ using Elizabeth Arden™ red? The color should at least appear to be correct. Recalibrate your printer according to what the manufacturer recommends, and test color compatibility between software applications. A printer serviced and recalibrated only before final printing could produce results drastically different from earlier drafts.

Backup—During the proposal effort, backup the proposal network drives frequently. Install an internal or external Iomega® Zip®-disk drive and a CD-ROM writer on at least one production workstation, to provide extra backup capability and meet any electronic submission requirements.

Security—Establish reliable communication practices and security standards for your team as early as possible. Integrate reliable security controls into the proposal network that will not obstruct the work. Ensure that your team understands that file and content security, whether physical or virtual, is everyone's responsibility.

The Cutting Edge...Bolster Best Practices with Training

File Management Training—Support the proposal effort with a centralized network drive and consistent file structure. Train your team to work within a configured file management system and to consistently save their work to the proposal *staging* network drive. Avoid version control catastrophes by setting a standard for consistently logging and naming files that correspond

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Overview ACTIVITIES, NEEDS, DRIVERS		PHASE		
		Infrastructure	Staging	Publication
Equipment	Memory, server and local hard disk space	✔		
	Removable disk requirements	✔		
	Software	✔		
	Security	✔	✔	✔
Training	File and Graphic Management	✔	✔	
	Software Applications	✔	✔	
	Writing Style	✔	✔	
Graphics	Fonts	✔	✔	
	Logo Searches and Cleanup	✔	✔	
	Template design		✔	
	Identifying useable photographs	✔	✔	
	Building graphics		✔	
	Covers		✔	✔
	CD labels		✔	✔
Document Formatting*	Formatting draft text to template and page count		✔	
	Placing graphics in document		✔	✔
	Proofreading		✔	✔
Physical Print Media	Working Table of Contents		✔	
	Dummy book		✔	
	Tabs		✔	
	Paper		✔	
	Binding selection		✔	
Navigation	Cross-referencing			✔
	List of acronyms			✔
	List of Figures			✔
	Table of Contents			✔
Printing	Outsource or In-house	✔	✔	
	Number of printers	✔	✔	
	Consumables	✔	✔	
	Server space	✔		
	Red Team RIP time and pages per minute		✔	
	Red team printing		✔	
	Red team collation		✔	
	Red team book checks		✔	
	RIP time and pages per minute			✔
	Printing			✔
	Collation			✔
	Book checks			✔
Electronic Media Publishing	CD purchasing	✔	✔	✔
	CD labeling			✔
	Hyperlinks			✔
	Transfer files to local drive			✔
	Front end design			✔
	CD burning			✔
Publishing Orals	Projection issues		✔	
	Slide creation		✔	
	Orals book printing			✔
	Orals transparency printing			✔
	Orals collation			✔
	Orals book checks			✔
Shipping	Packing and Shipping			✔

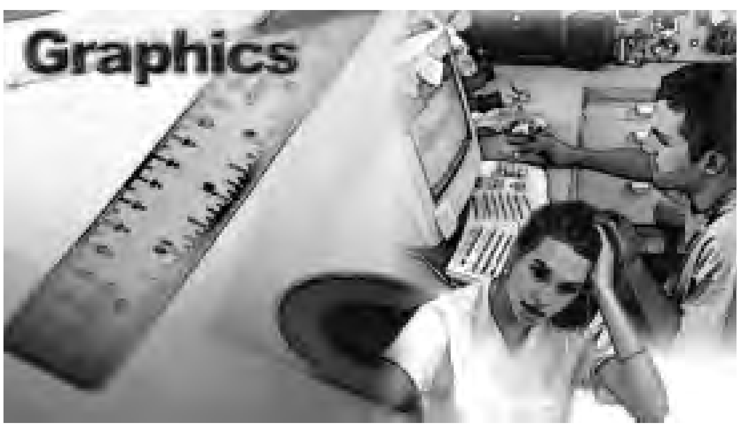
* Not amplified in text

to version or development phase changes. Different people work in different ways, so encouraging consistency is key.

Applications Training—Because your customer may specify a software version for electronic deliverables that is entirely new to some proposal team members, the proposal team may need training. Some may be skillful in a variety of applications but, regardless of their familiarity, team members often direct questions about software to the production team. A production team can provide basic instruction as needed, or make a plan to import unformatted material from authors for formatting within an isolated production environment. This approach might be ideal for a small proposal.

Writer Style Training/Guidance—Another approach is to create a printed or electronic guide for working within the template, specifically tailored for proposal development, as part of the *infrastructure*. Some authors may be unfamiliar with the proposal writing style or with working within a template. Training for this helps them limit their writing to allocated page limits and concentrate on generating data-rich content without wasting time attempting to format the document.

The proposal may need an editor separate from the authors, to edit content to conform to proposal writing style and page limits. If the intended customer for the proposal is overseas, it may be necessary to edit the text in a style consistent with regional grammar and dialect, e.g. U.S. to U.K. English, which could require more editing time in the schedule.



The Big Picture...Good Graphics Belie the Hard Work They Take to Create

Font Selection—Response format instructions may specify font point-size for text, graphics, and captions. If the instructions do not specify a common typeface, choose widely available fonts such as Arial and Times New Roman. Choosing other fonts may prevent the customer from seeing your electronically submitted proposal the way you intended if they do not have those fonts installed on their PCs. This is especially common with symbols and bullets, and with orals handouts. One solution is to embed fonts within the documents, but this increases file size significantly. You can send the font to the customer with installation instructions, but why inconvenience them? The best solution is to stick with standard, widely available fonts.

Logos—Customers will not likely provide print-ready artwork for proposals, such as their correct, registered company logo, and artwork from the Internet does not always reproduce in print at high quality. Your production team may need to conduct a search for viable identity artwork and complete a professional quality touchup.

Templates—Proposal template design should accommodate page limitations, single-sided or duplex printing, graphics, text, and readability. They should be compliant with all response format instructions. Choose colors that incorporate the bidder's identity with the customer's expectations. Test palette colors in print, on a properly calibrated printer. Test print results using the color formulas on the various software applications used for the proposal. It may be necessary to color correct or test alternate file types.

Developing a template style guide for the authors that outlines the color palette, line weights, fonts, styles and sizes — the "look" of your proposal — could take from a few hours to several days, depending on how many authors there are and how many people are involved in the approval process.

Photographs—Generally, copyright laws are in effect for most artwork. Photography copyright rests with the photographer. An image from a magazine is the copyright of the magazine. Content found on the Internet is usually the copyright of the entity publishing that Web site. As a published document, a proposal should exclude material constituting copyright or trademark infringement. If possible, get permission or license to use any artwork gathered for the proposal; otherwise create original artwork specifically for the proposal, or obtain royalty-free artwork.

A photograph can send a poignant message to the customer. Production team members may be unfamiliar with the bidder's company or specifically with the products or services that the proposal addresses. It is essential to collaborate with experts when selecting appropriate, useable photographs.

Photograph cleanup is difficult without full-scale graphics software, such as Adobe Photoshop or JASC Paint Shop Pro. A scanned image is not always good enough and touchups may be necessary, e.g., the removal of an unwanted object from the background of a résumé headshot. Some photographs may require considerably more time and work to touch up, requiring skilled pixel-by-pixel changes. Experienced artists who are familiar with proposal publishing are a challenge to find.

Use a good scanner, and set the scan resolution (stated in pixels per inch, or ppi) at a minimum of 150 ppi. If you intend to enlarge the image in print, scan at a higher resolution so that the resulting image will be no lower than 150 ppi.

Graphic Production Estimates—The production time necessary for illustrations depends on complexity, the skill of the production/graphic designer, and the quality of the drawing, paint or charting programs used for the task. Some general guidelines are offered above.

It can take at least one day for one graphic artist to create the first draft of tables, charts, graphs, drawings, photographs, custom characters, custom bullets, icons, or small, full-page, or foldout charts. It will take longer if the author needs the graphic artist to develop the concept for illustrating the point. In all cases, your

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graphic artists need enough time to draft each artwork request, using the best equipment available. More lead time is necessary if there is an impending deadline crunch. It may not take one person an entire day to produce each graphic, but in a proposal, when developing dozens of graphics at the same time, requests stack up.

Covers—Barring a blind selection evaluation rule, what would encourage the customer to pick up your volumes to read first? To conceptualize and design a first-rate cover, the artist needs to consider the customer's and the client's culture, and the nature of the contract at stake. Bear in mind that some clients have strict branding rules for covers and other published collateral.

A meeting with management and the artist is worthwhile to determine what style would appeal to the customer, whether realistic or abstract, conservative or progressive, or a combination of styles. If the schedule permits, design more than one choice for consideration and approval, keeping in mind developing each cover concept takes time.

Usually an RFP will include response format instructions about the information that must appear on the outside and inside covers. Some may require a cover for each section. Check the instructions for compliance and accuracy.

Schedule print time for covers just as for printing pages of the proposal. If the red team review requires a total simulation of the final volumes, allow for double the cover printing time in the proposal schedule. Each set requires the absolute printing time and paper to produce the necessary number of covers. Final covers may not be critical to have for red team, but final covers require print time in the schedule.

CD-ROM Labels—If you print volume covers and spines in-house, then someone has to do the painstaking job of cutting and inserting them in binders, and do it carefully. For CD-ROMs, covers and labels should complement the printed book cover design. Check response format instructions for identifying CD-ROMs.

Physical Print Media ...The Devil is Still in the Details

Paper—Response format instructions may dictate the type or standard of paper to use in a proposal. The instructions may indicate the paper weight, color restrictions, size, single-sided or duplex pagination, and foldout-page restrictions. An overseas customer may require a metric size paper. If this is the case, test the printer capability for metric or unusual paper scaling. The ability to adjust the paper tray may not be an indication that the printer will automatically accept unusual sizes. Keep in mind that some printers specify only their own manufacturer's stock. Ordering unusual sizes or equipment takes time.

To determine the amount of paper for the job, estimate for several complete drafts, red team sets, final proofs and publication sets, oral presentation sets, covers, and navigation pages. The draft paper quality may be different from the final quality and weight. The bottom line is to have more than enough on hand.

Dummy Book—Setting up a dummy book with blank final quality stock and tabs can be quite valuable for a large proposal, and usually takes a relatively short time to prepare. A dummy book arranged to page-count allocations can give early warning that selected binding is the wrong size or type. Dummy books also give the production team the opportunity to present a tangible sample of page and tab layouts for management approval.

Tabs—Tabs are the common method of separating volume sections. It is helpful to have the resources to schedule tab production in-house. One concern is that certain printer manufacturers restrict the use of tab media to their own brand. For relatively small proposals, a clear-back label maker can be a cost-saving method for identifying sections. For larger proposals, it may be better to outsource the job. Professional reprographic services have a variety of tabs in different colors. Some provide

Estimates for Producing a Graphic		
Basic	1 to 3 hours	• Simple map, chart or vicinity map with proofread numerical data and no more than 25 plot points • A less-than-full-page pie, bar or line chart, including clarification or legend of content • Add 1 to 3 hours for 3D depth, texture, detailed backgrounds or further explanation to the graphic, such as a detailed blowup of pie slice or bar
Detailed	3 to 8 hours	Includes Basics, plus: • More data points, or stacked information • Charts over screened images with overlaid data lines plotted on top • Cutaways of equipment, structures or area masses • Detailed vicinity maps • Lengthy or data-rich matrices/tables
Complex	4 to 16 hours	• Photographic montages • Photo editing, background and color correction • Effects, such as beveling, embossing, realistic shadowing, cast light, distortion, texturing, text effects, etc. • Conceptual illustration of an abstract idea into a distinct icon or picture • 3D illustrations of equipment or structures • Estimate assumes clarity of customer's initial request. If their direction or the data change, the whole process may require repeating.

templates to electronically set up the tab labels and titles in-house, and then send the file to reprographics for printing. In any case, schedule time to organize the proposal section tabs, both for approval and printing.

Binding—Three-ring binders are common media for proposals, and come in a wide variety of shapes, colors, ring designs, and sizes. Selecting the best type for your proposal takes some investigation. Have enough supply for dummy books, go-by sets, the red team sets, a proof set, final sets of volumes and orals, and management and library sets.

Comb binding and spiral binding are popular alternatives to three-ring binders. Loose-bound or removable page(s) instructions, however, exclude these binding methods. When using these binding methods, plan to print the volume sets in their entirety before binding.

Overseas customers who require metric paper sizes will need four-ring binders. Allow plenty of time to identify a source for these, in the sizes and quantities you require.

Mapping the Territory... Leave Time to Develop All Navigation Aids

Cross Referencing—Hyperlinked, electronically evaluated proposals are in increasing demand by customers. The leading software tools add tremendous convenience with automatic cross-referencing features, but cross-references manually and incorrectly inserted by authors may go unnoticed without a thorough review. Schedule time to review every cross-reference after all content has been completed and formatted. Ideally, a team of at least two people should check for consistency.

List of Acronyms—Bookmark tools can be useful for compiling acronym lists. Like other cross-references, more than one person should review acronym lists for accuracy. Support your infrastructure with ongoing electronic lists of acronyms kept on the network. Authors may not work in sections sequentially, and may define an acronym long after it first appears in the proposal. Verify defined acronyms with a page-by-page check.

Table of Contents and List of Figures—Generate the table of contents and list of figures last. Automated table of contents and list generation is a valuable software feature, but sequencing instructions may prevent its use. Manual generation is more time consuming and technical, but keeping a working table of contents and list of figures during the proposal process may shorten final editing time and help you determine your tab layout. The page-count requirement for the proposal usually excludes the table of contents, but it must be included in the page-count for scheduling printing time.

Printing

"Doing" the Books

Outsource or In-House—When security or necessity permits, sending the final print job out for reproduction is very convenient. Theoretically, correct calibration for matching CMYK, RGB, or Pantone® color formulas should produce identical results from printer to printer, but differences could result for any number of reasons. Different printer models will produce different results on the printed page. Even two identical models might produce different results. Your print proof result most likely will not be identical to an outsourced final product.

Printer Quantity—The recommendation is to have more than one dedicated printer available for red team and final production. Ideally, the printers will be the same model. If a backup printer is unavailable, schedule the print job with reprographics as far in advance as possible, to limit the impact of equipment failure.

Consumables—Printing thousands of pages requires having spare consumables ready to go, including backup printers in some cases. If spares are not readily available, the necessity to replace consumables or parts during final production could fatally delay the job! Research and estimate the number of pages each printer cartridge of toner, developer, and consumer-replaceable part will support. Replenish your supply of these parts (including paper) long before their recommended duration, to ensure the quality and size of estimated print jobs.

Required number of sets	10
Total page count per set	200
Navigation Pages per set	9
Section covers per set	20
Volume covers per set	3
Pages required	2,320

A print job breakout on which to base your estimates might look like this (see insert).

This example shows the final, cumulative printed page count, irrespective of printer problems, paper orientation, type and size changes, or page replacements. Always maintain an adequate paper supply in the correct weights, colors, and sizes to accommodate your estimated count.

Server Space—Most professional color printers are equipped with a server to buffer the print job, but inadequate print server RAM and disk space slows printer output. Generally, 6 to 8 pages per minute (ppm) may be optimum for output, but your final production schedule must accommodate slower printers. If necessary, get your MIS team to set up an adequate server as part of the production *Infrastructure*.

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RIP Time—"RIP" is an acronym for raster image processor, the printer function that digitally computes the brightness and color value of each pixel of the final page, so that the resulting pattern of pixels recreates your graphics and text. The RIP time will vary depending on proposal file size, RAM and buffer capacity, and the complexity of the graphics.

Collation—Automatic collation is a nice printer feature to have on small jobs, but it can substantially lengthen print time it takes to print a volume. Printing a volume by grouping the pages (i.e., 1-1-1, 2-2-2, 3-3-3) and collating the pages manually, is faster because the printer will RIP each page once, and output the pages in sets.

Red Team Inclusion—The estimate in the table below does not include RIP time, which could be more than a minute per page, depending on complexity. It takes far less time to RIP 200 pages and print in groups than to RIP 2,320 times. In either case, estimate the print time to include red team and final sets. If management specifies a backup delivery plan, then increase the print time estimate to include redundant deliverables. In addition, calculate the print time for a proof print, oral presentation sets, and any other required sets.

Pages Required	2,320
RIP time per page	**?**
Grouped ppm	6
Minutes required	386.4
Estimated hours	6.5

Book Checks—Although it is a tough task for a nearly exhausted proposal team, you really should conduct a page-by-page book check of each deliverable item. Account for all pages and the correct sequence of pages, and account for proper print results. Any discrepancies add reprint time for those pages or sections, plus time for making actual corrections. A hidden benefit of printing pages in sets, as described above, is that the subsequent manual collation provides an automatic visual book check!

Information Automation... Electronic Media Publishing

CD-ROM Purchasing—Cheap CD-ROMs can produce expensive results, but an unreadable CD-ROM is a real problem. Invest in a reliable read/write CD-ROM.

CD-ROM Labeling—Like cover and spine cutting, somebody has to painstakingly affix a label to each CD-ROM, and do it with precision. Always test each CD-ROM for file readability before affixing labels.

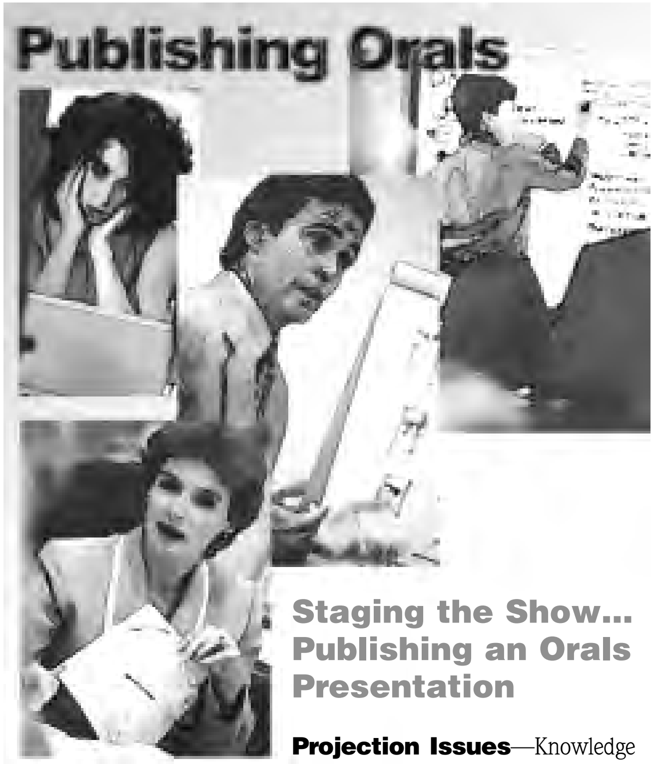
Hyperlinks—A hyperlinked cross-reference requirement can connect sections, graphics, files, etc. The more hyperlinks required, however, the longer it will take to set them up, and to check each one. Make sure that hyperlinks set up between files on the proposal network server actually work when burnt to a CD-ROM.

Front End Design—A "front-end" graphical interface — or "skin" — is a pictorial screen the evaluator sees when the CD-ROM is loaded. It allows easier navigation to particular proposal sections or topics than the standard file explorer. The configuration of the files must be determined during *staging*, to develop a workable interface during the same phase. Otherwise, the links designed to navigate to the files will fail.

It is fine to make a "read/write" CD-ROM during testing, but the CD-ROM to be read by the customer must be "read only." Testing is important, because some machines may not read the CD-ROM properly, e.g., a CD-ROM created on a Mac may not be readable in a PC, and vice versa. Test the readability on as many PCs and Macs as available.

CD ROM Burning—Estimate the amount of time it will take to create the required number of CD-ROMs. This time will vary depending on the number of CD-ROM writers available, the number of CD-ROMs required, the speed of the CD-ROM writers, and the efficiency of the CD-ROM creation software. In addition, CD-ROM creation must wait until the printing is final, as it must match the printed deliverables exactly.

A "front-end" graphical interface — or "skin" — is a pictorial screen the evaluator sees when the CD-ROM is loaded. It allows easier navigation to particular proposal sections or topics than the standard file explorer. The configuration of the files must be determined during staging, to develop a workable interface during the same phase. Otherwise, the links designed to navigate to the files will fail.



Staging the Show... Publishing an Orals Presentation

Projection Issues—Knowledge of the presentation facilities, including room size and monitor, overhead and rear-projection capabilities and specifications, is helpful but not always available.

Test compatibility between your laptop and the projector model if you know it. Some combinations just do not work, for reasons unknown. Plan to take transparencies as a contingency, and schedule print time for them. Cheap transparencies are not always cost-effective. Check if the printer manufacturer specifies its own brand of transparent stock for their printers, as feeding the wrong type of transparent stock through a printer can cause the sheets to melt onto the printer's internal parts and cause permanent damage. Protect transparencies with good-quality clear plastic envelopes, or use special transparency holders.

Slide Creation—Oral presentation slides must comply with response format instructions. Check the slide identification requirements. The presentation template design should be functional, and have a corresponding appearance to the printed proposal format. Setting up this template can be just as time consuming for the presentation as for the printed proposal document. Slide presentation handouts are submitted on paper, and the oral presentation slides are projected, so there are various considerations, e.g. whether to use a colored background or a white background.

In some cases, your proposal team may be unaware of the customer's projection facilities. The customer may indicate it has a projector and screen, or a rear-projection monitor, or he or she may require overhead transparencies. The customer may also specify that bidders bring their own projection system with them. Test projected and printed colors and effects. Each type of projection produces a different appearance and readability, so design and produce the template to work under any conditions.

For scheduling, estimate a minimum average of one half hour per slide for the initial creation of the presentation. The total time required for each slide depends on the complexity of the content, and the approval/review cycles. Some may take less time, some significantly more.

Orals Books / Transparencies—Invariably, a submission deadline for a printed book or binder of presentation slides will coincide with the deadline for the proposal volumes, or be set at some point before the scheduled oral presentation. Calculate the total print time for red team and final submission, plus handouts, plus backup transparencies into your schedule. Print backup transparency sets after the submission deadline, without any post-submission edits, to hand carry the presentation. As with your printed proposals, check all deliverable copies.

Packing Up and Shipping Out

You may need to plan for redundancy in delivery methods, which would require producing two entire sets of deliverables. For example, there may be a plan to ship one deliverable and hand-deliver another. In either case, double the initial absolute print time estimate to allow for a redundant set of deliverables.

Response format instructions for packing and shipping the deliverables can vary from simply specifying time and place, to quirky packaging rituals that must be complied with, such as double-wrapping with plain brown paper and wax sealing. Ensure labels are compliant with the RFP.

What is the most unusual delivery requirement you have come across? Plan for it!

Conclusion

Proposal teams should use a realistic timescale for completing tasks and schedule enough lead-time in consideration of available resources. Share your timescale with the proposal manager to share with your entire team.

As an SM&A Associate, Suzanne Kelman is involved in proposal publishing management and technical communications development. She has taught software application seminars for two accredited career institutes, and is an APMP member. Her proposal experience includes numerous commercial bids and environmental proposals to the Department of Energy and proposals to the Department of Defense. She can be reached at suzanne_kelman@email.msn.com.

Article

A Bidder's Dozen:

Golden Rules for Winning Work

By DAVID G. PUGH, Ph.D.

Can a few Golden Rules help you realize a 200-to-1 return on investment using business development processes and tools? Here are some rules and how they might apply to your markets, your customers, and your business opportunities.

My colleagues and I at Lore International Institute provide consulting and training services with a major focus on proposals. Every time we collaborate once again we seem to return to certain basic and relatively simple concepts that drive what we do. We call these 13 concepts our Golden Rules. I hope the bidder's dozen of rules summarized in this article will motivate you to think a bit further, and a bit differently, about how business development is conducted in your organization.

The Golden Rules have moved many of our customers to do just that, often with very rewarding results. Sandia National Laboratories in New Mexico, for instance, realized a 200-to-1 return on investment by implementing many of the business development processes and tools discussed below, a datum they validated through a comprehensive follow-up study.

So whether your organization seeks business in the public sector, the private sector, or both, reflect on the Golden Rules and how they might apply to your markets, customers, and opportunities. Further, revisit a couple of recent tough losses in light of what the Golden Rules reveal about what it takes to win today. Use them. Adapt them. Reshuffle them. Recast them to your organization's language and systems. They are yours now. Enjoy.

Golden Rule #1:

First and foremost, a proposal is a sales document.

A proposal is, of course, many things, depending on who is preparing it and who is reading it. Although the contents will vary widely by industry and market, a typical proposal could contain an abundance of technical, programmatic, personnel, scientific, product, background, legal, pricing, and/or contractual information in various combinations. Yet we also know that, at the most fundamental level, a proposal is not a technical treatise, a scientific monograph, a legally binding contract (at least not when submitted and evaluated), or a textbook on project management. Rather, the DNA, so to speak, of a proposal is that it is a sales document. You have to sell your technical approach, your project management expertise, your scientific wizardry, your state-of-the-art widgets. If all you do is clinically and bloodlessly describe these things, you are failing to give the customer compelling and substantive reasons to choose your offer over your competitors'.

Paula Grunthaner, Manager of Advanced Instruments at the Jet Propulsion Laboratory, put it this way: "If you are planning to submit a proposal, you definitely want these tools in your shed. You will work smarter with less stress and produce a sales document far superior to anything you have produced before."

Look at it this way: Engineering is complicated; selling is not. It is very important in the tough markets you face every day to build your business. When you set out to sell in a proposal, you are really attempting to answer four basic questions better than your competitors can answer (who, in many cases, will not even attempt to answer them, thereby giving you a tremendous advantage). I call these questions the Big Four:

- Why us?
- Why not them?
- So what?
- How so?

There they are—four simple questions. But if you provide powerful answers to them throughout your proposals, you will also provide compelling and substantive reasons for your customer to choose you.

Why Us?

Your best answers to Why us? include your positive differentiators, i.e., what you offer that is different and better than what the competition offers relative to the customer's needs. These differentiators are your aces, and you turn them into deal makers in your proposal.

Why Not Them?

The best way to answer Why not them? involves a technique called "ghosting." Essentially, you know enough about the competition's offer, approach, product, track record, etc., to discuss their disadvantages to the customer versus the advantages of using what you provide. The critical factor here, of course, is that you make your points without ever mentioning your competitor by name. For example, if you know that a competitor will offer a young, inexperienced project team to lower their price, in your proposal you discuss the risks of launching the project with an untested, unproven team (e.g., longer learning curve, trial and error management, negative surprises) versus the lowest possible risk of using (and paying for) an experienced, more educated, team of proven professionals (no learning curve, proactive problem solving, lessons learned, and so on).

That is ghosting, and it allows you to sell yourself and also to unsell the competition. If you really wanted to compete on a level playing field, you would not bother ghosting during your pre-proposal contacts with customers or in your proposals.

So What?

Providing great answers to "So what?" is one of my favorite proposal challenges. Keep in mind that proposals are typically content intensive: they focus primarily on the details of the offer, which are often technical or programmatic in nature. Because they do this, proposals end up stuffed with solution features, including

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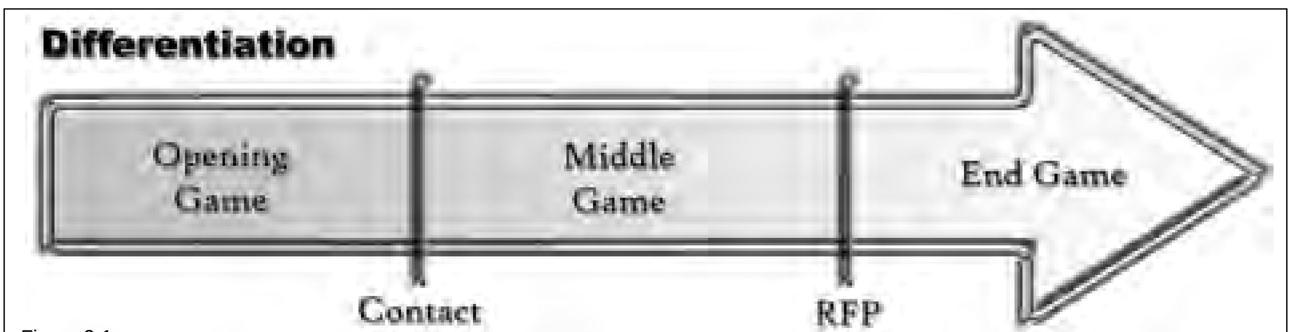

Figure 2-1

endless engineering and other details defining what you hope the customer will buy. But features such as "Our project team brings 323 years of aggregate experience to this challenge" actually cause the customer to ask "So what?" Whenever that happens, you have to be prepared with an answer that includes compelling, bottom-line benefits associated with the feature.

If you remember nothing else about Golden Rule #1, please remember that features create the question "So what?" and benefits answer that question. If a proposal's DNA defines it as a sales document, then by definition it must be benefits-rich. Because communicating benefits is such a critical part of business development, I have extended the discussion in Golden Rule #4 below.

Figure 2-2

How So?

To sell, an excellent proposal also includes proofs and substantiations of all of its major claims. If you claim that you can shorten the delivery schedule by three months, that is great. But anticipate that the customer will read that claim and ask "How so?" And when you provide a convincing, detailed answer to that question, trust and credibility become key drivers of the buying decision. In a tight competition (aren't they all these days?), that alone can make the difference between winning and losing.

Golden Rule #2:

A proposal should not be an isolated event.

A Golden Rule is part of an ongoing process to differentiate your offer, people, and organization from the competition in the eyes of the customer.

The process of creating positive differentiation and reducing or eliminating negative differentiation needs to begin long before the proposal (i.e., Opening Game and Middle Game) and then extend all the way through the proposal process as a critical success factor in End Game (see Figure 2-1).

Positive differentiation does not simply occur. You have to create it. If you wait until it is time to write a proposal to differentiate your organization and your offer from the competition, you are probably too late. Worse yet, if any of those competitors worked during the Opening and Middle Game to create positive differentiation for themselves, you will lack such differentiation for yourself in the End Game, and also be faced with overcoming negative differentiation, a situation that could (and often should) trigger a no-bid decision.

The key point I want to make here is that differentiation, like a proposal, is not an event but part of a never-ending process to break from the pack in the eyes of the customer. And in business development, as in chess, you cannot afford to wait until the End Game to get serious about winning.

What this concept means then, is that boilerplated differentiation is a contradiction in terms because everything in this regard relates to a specific customer's specific needs. That is the opportunity you want to capture. To determine what differentiation you have and what needs to be created (or eliminated in the case of negative differentiation), you will want to do Sweet Spot/Sour Spot analysis (see Figure 2-2).

According to Paul Sykes, End Use Manager, Shell Chemical, "this gives us a better process to identify customer needs and qualify opportunities. The benefit will be a higher success rate in commercializing new opportunities and better utilization of dwindling resources."

"By focusing on the customer and their needs, we will build stronger and longer lasting relationships, thus increasing customer satisfaction and retention."

Scott Marks, MSP Sales, Alltel

Golden Rule #3:

If you do not have an effective strategy or take the time to develop one, lower your price.

If you agree that a proposal is a sales document, then we need to take the next step and hopefully agree that unless a proposal is strategy driven, it cannot sell. Strategies give us our best answers to Why us? and Why not them?, as well as powerful positive differentiators that set us apart from our competitors and help us to win without low price.

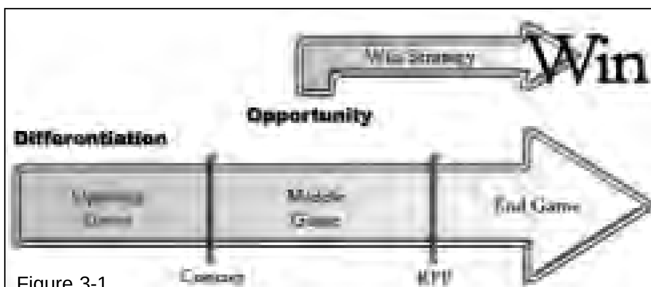

Figure 3-1

Figure 3-2

Consider this simple and, for some, unnerving fact. There is always one differentiator the customer can use to make the buying decision, and it exists at the southeast corner of the spreadsheet: price. So in a very real sense, if you are not going to be the low price provider, you are not just selling your approach, offer, or solution. You also need to sell your price, and that means you need strategies.

Strategies must be properly understood, developed, and deployed

However, the strategies that drive your proposal in the End Game should not suddenly be created out of thin air when the RFP arrives. They must be properly understood, developed, and deployed. Certainly you may need to develop some strategies based on the solicitation, but your key win strategies should be developed during the Middle Game, as part of your opportunity pursuit and efforts to build preference with the customer. You can then drive these strategies, or adjusted versions of them, directly into the proposal (see Figure 3-1).

As soon as you identify and qualify an opportunity, the ongoing process of creating positive differentiation and minimizing or eliminating negative differentiation is recalibrated via strategies that address the specific opportunity you are now pursuing. To put it another way, growing the Sweet Spot and shrinking (or even eliminating) the Sour Spot requires opportunity-specific win strategies (see Figure 3-2).

Golden Rule #4:

Customers do not buy what it is; they buy what it does for them. They buy benefits, not features.

Nobody needs a better mousetrap. Nobody. What they need is fewer mice. If the "better" mousetrap cannot deliver that, why would anybody buy one?

In a business context, this much seems certain: customers spend a ton of money not to solve a problem—after all, they are not in the problem solving business—but to achieve certain business goals. The best benefits you can offer, therefore, are bottom-line benefits that get the customer to their bottom-line goals. Our approach links 1) the customer's goals 2) their key issues while they are selecting someone who can get them to those goals, 3) the features of our offer, and 4) the benefits of those features. To build trust and credibility, we always provide proofs that those benefits are, in fact, real for the customer. The process is shown in Figure 4-1.

Golden Rule #5:

In a proposal, you do not just sell here and there. You sell all the way through.

To sell effectively, a proposal uses three communication elements:
- Themes
- Visuals
- Text

I have listed them in descending order of communication power and preparation. Individually, each element can deliver answers to the Big Four, but these elements can also be combined to make the communication even more powerful. A visual, for example, communicates much better when it includes a full sentence caption that provides a feature-benefit interpretation, expla-

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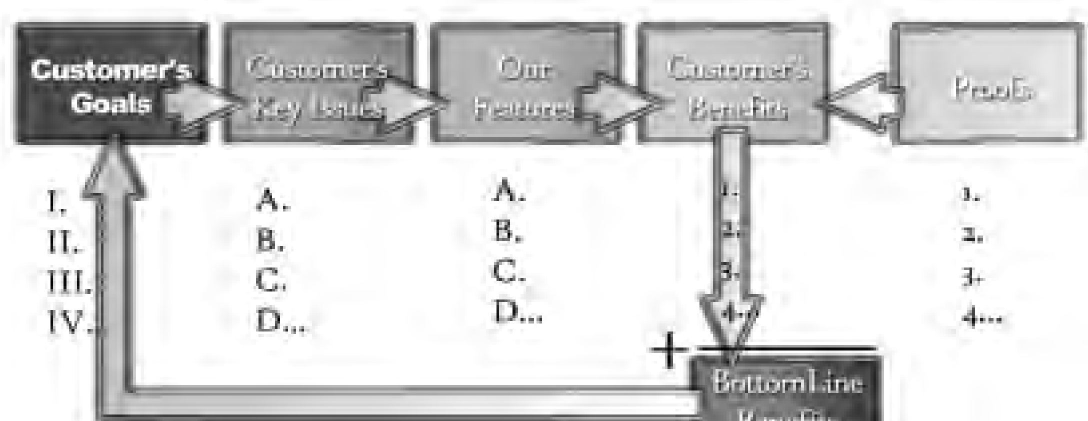

Figure 4-1

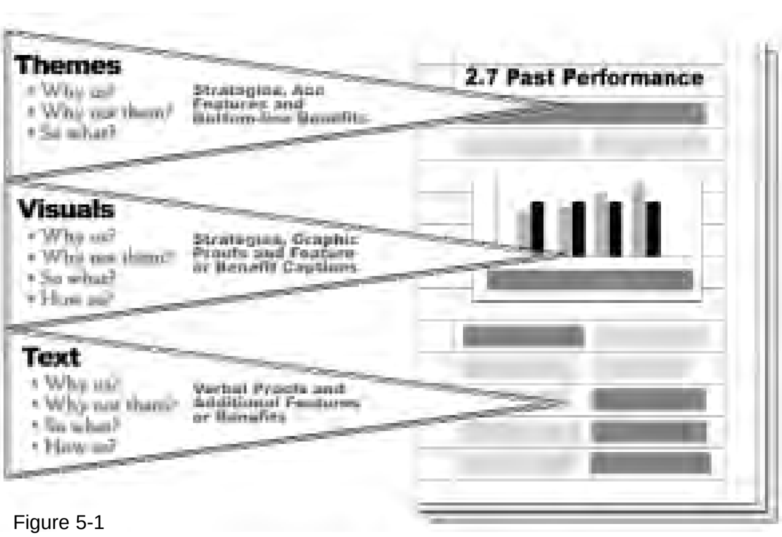

Figure 5-1

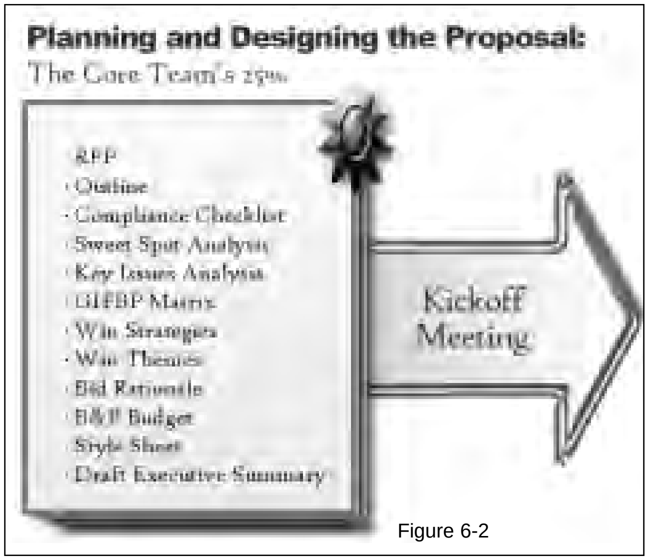

Figure 6-2

nation, and/or elaboration of what is depicted in the visual.

The best way to sell is to become skillful at using all three communication elements throughout your proposals (see Figure 5-1).

Golden Rule #6:

Virtual planning is virtually useless.

As if proposals were not hard enough work, the chaos that often accompanies proposal preparation adds even more hard work (but not more productivity or quality). Because lack of thorough planning is a major cause of proposal chaos, following an established process and applying the right planning tools gives you a competitive edge against all competitors who still do virtual planning, then prepare for the chaos to hit by issuing sleeping bags and an open-ended purchase order for doughnuts and pizza.

After learning our business development process, including proposal planning, Halliburton's Daniel Brewster concluded that "there is a methodical approach to all aspects of business acquisition that can lead to a more efficient use of our business development dollars."

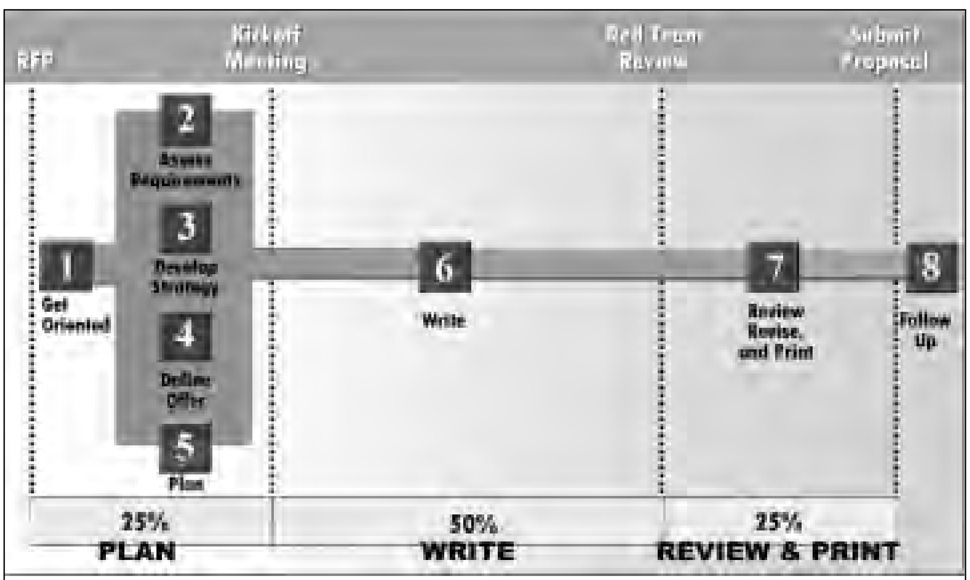

Figure 6-1

Concentrating on just the End Game here, we have devised a practical process for developing the proposal, one that will at least contain the chaos and ensure maximum efficiency, productivity, and quality throughout the effort. We call this process 25-50-25 as shown in Figure 6-1.

The absolute key to doing real planning rather than virtual planning is the first 25 percent. In that area, the core team—typically four to six people representing business development/sales, the offer, and proposal expertise—plans and designs the proposal and its parts, each a tangible deliverable to the kickoff meeting (see Figure 6-2).

Golden Rule #7:

The audience, not the author, drives the design.

A call on a current or potential customer in the Middle Game often ends up being an exchange between two counterparts: engineer to engineer, for example, or executive to executive. Both parties speak the same language, sharing to at least some degree certain business perspectives, key issues, concerns, and goals. That is how relationships, trust, and credibility develop in the Middle Game.

In the End Game, however, the challenge is much different and more difficult because the proposal is most often a written document that has to communicate to a highly diverse, or mixed, audience. We characterize that audience as eight communication "filters," through which the proposal's messages must successfully pass (see Figure 7-1).

While trying to communicate effectively with each filter individually would be next to impossible in a proposal, we can, in fact, group these eight into two clusters as shown by the shaded ovals. That is, in most situations, especially involving technical solutions of any kind, experts tend to be inductive thinkers who, because they are experts, will scan the proposal (i.e., scrutinize it), and conceptualize visually. If you ask an engineer, "How does

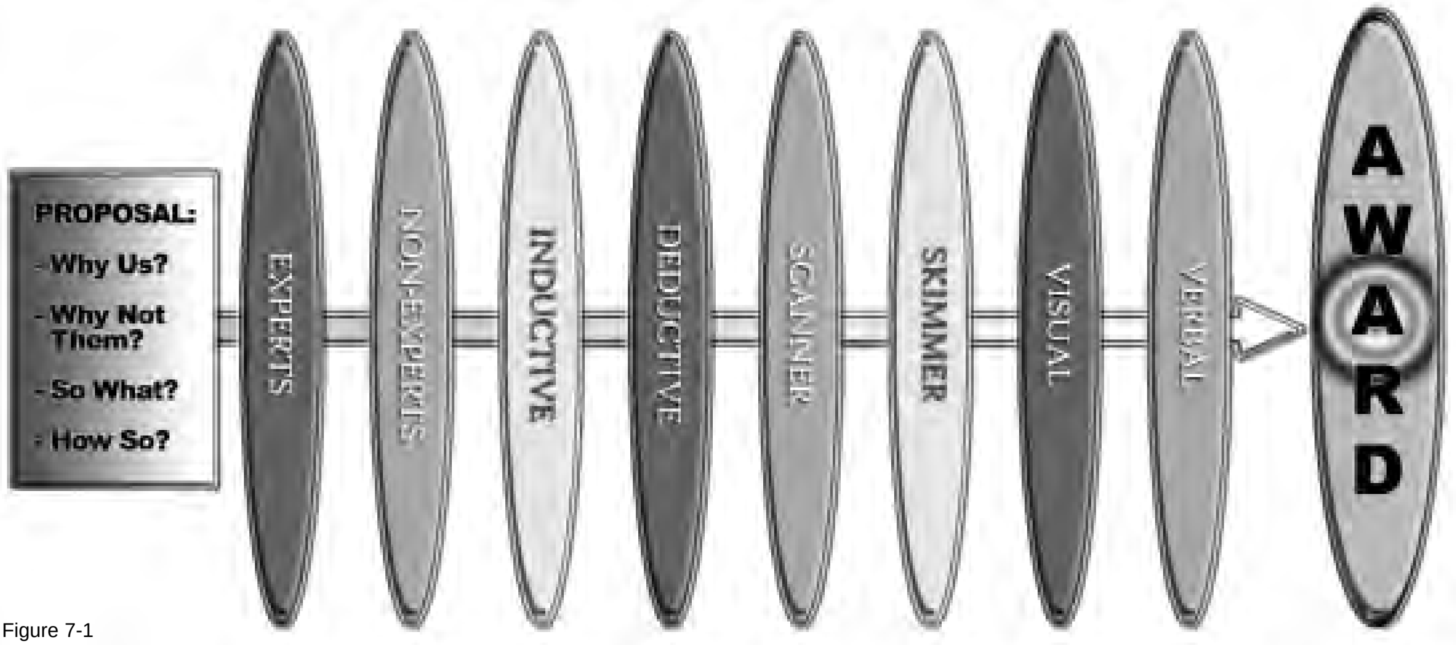

Figure 7-1

that work?" he will probably say, "Let me show you" and then begin drawing a process flow diagram.

They were 2.5 times more likely to win when they designed and delivered key messages directly to decision makers

Conversely, non-experts tend to be deductive thinkers who, because they are non-experts, will skim the proposal and conceptualize verbally. While it might be tempting to discount or even dismiss this second cluster, consider which of the two typifies most decision makers. In fact, one of our global engineering and construction customers determined that when they invested in communicating their best answers to the Big Four in an executive summary specifically designed for that audience (with a slight variation on the model because most executives conceptualize visually, not verbally), they increased their probability of winning by about 250 percent. That is, they were 2.5 times more likely to win when they designed and delivered key messages directly to decision makers in ways that made those messages both compelling and reader friendly. The Lore model—subject, of course, to modification for a particular audience—as shown in Figure 7-2.

The non-expert, deductive reader wants the main idea—called the theme statement—at the beginning of the text (top of the page). These readers do not want to plow through a mass of detail and data, which is essentially meaningless to them, before they can find the main idea at the end. Further, the non-expert will want key sub-messages punched up with emphatic writing to facilitate skimming.

The expert will not accept the main idea until they have examined all of the details and data. Detailed data leads this type of reader to the idea, which they want stated as a summary at the end of the section. Further, as a visual processor the expert will value and understand key concepts conveyed with effective graphics.

Our approach to designing and developing an audience-based proposal is called Double Exposure on a Single Plane. Much like two photographic images exposed on a single sheet of paper, a

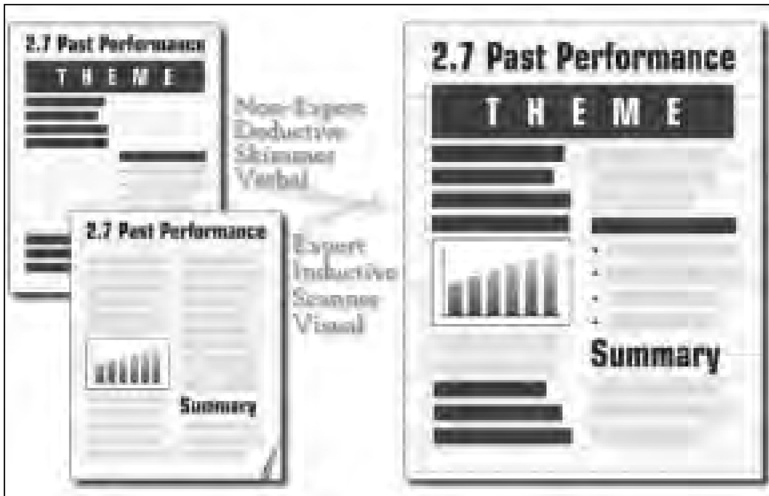

Figure 7-2

proposal differentiates itself by "showing" its content in two ways so that the messages get through those eight filters and, hopefully, hit the Award bulls eye.

In a tight competition, communication effectiveness—getting your messages and strategies through better than anyone else—becomes a critical success factor for winning.

Golden Rule #8:

Ease of evaluation is a very real factor of success.

Ease of evaluation certainly includes Golden Rule #7, but also a lot more. To understand how important ease of evaluation is, I always return to what our experience over the years has taught us about evaluation: Most, if not all, evaluators will not read a com-

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Figure 9-1

peting proposal word for word. If they have to do that to find a winner, we are making them work too hard.

They read the theme; they consider the visual; they read the caption; they turn the page.

Instead, evaluators talk about getting "on the roll" during evaluation, and it is obvious that they value the proposals that help them do just that. They read the theme; they consider the visual; they read the caption; they turn the page. Occasionally, they drop into the text, study it, and determine that the proposal is satisfactorily substantiating and explaining its claims. When they see that happening, it is back on the roll again.

The reader-friendly proposal is easier to evaluate and, compared to competitors' proposals, it leaves nothing out. Some of the attributes of a proposal designed with ease of evaluation in mind include:

- A Powerful Executive Summary
- Audience Designed
- Brochure Style (1/3 visuals, 1/3 text, 1/3 white space)
- Separately Bound
- Customer Focused
- Strategy Driven
- Benefits Rich (Answers Why us? and So what?)
- Powerful Proposal Design
- Audience Designed (Double Exposure on a Single Plane)
- Double or Message Column
- Themed and Captioned
- 1/3 Visuals, 2/3 Text, Ample White Space
- Emphatically Written
- Active Voice and Personal Pronouns
- Effective Organization (Outline)
- Option 1: 100 percent Compliant with RFP Instructions
- Option 2: Mirror of the RFP
- Option 3: Mirror of RFP's Selection/Evaluation Criteria
- Response Matrix
- Used in Conjunction with Options 1 and 3 above
- Roadmaps All RFP Requirements to the Proposal's Responses.

In a tight competition, ease of evaluation—getting your evaluators on a roll and making it easy for them to choose you—becomes a critical success factor for winning.

Golden Rule #9:

In the early phases of evaluation, they are not looking for the winner. They are looking for losers.

The best insurance policy you have against being eliminated early in the evaluation process is 100 percent compliance with the RFP. Without that, your proposal is at grave risk of not surviving long enough to be taken seriously.

The challenge today is that full compliance may be enough to avoid early disqualification, but it is definitely not enough to win. Look at it this way: If the customer were to give a score from 1 to 10 (10 being high), what score would a proposal that is compliant —nothing more, nothing less—most likely receive? Our experience tells us a 5, maybe a 6, nothing more, nothing less. And you cannot win with 5s or 6s today. You need 9s and 10s.

To avoid early elimination, ensure that your proposal first achieves full compliance with the solicitation's questions, requirements, and specifications. Then move beyond that compliance to full responsiveness to differentiate your approach from all other compliant proposals, gain a 10, and move to negotiations (see Figure 9-1).

Golden Rule #10:

In most cases, proposals do not win contracts, but they can lose them in a heartbeat.

An interesting (and puzzling) datum in business development is the "win rate," sometimes referred to as the "hit rate." What it represents is the numerical relationship between opportunities pursued versus opportunities won, typically expressed as a percentage. So a company may decide that it needs help in improving their business development processes, systems, tools, skills, or whatever, because their win rate is currently 23 percent compared to their strategic goal of, say, 50 percent.

Companies submit proposals to win contracts. After they win or lose, they attach the result to the proposal alone.

Ironically, one indicator that a company actually does need improvement in business development is not the win rate per se but the fact that they attach it to their proposals. Almost without exception, companies submit proposals as part of the effort

Figure 10-1

to win contracts. But after they win or lose, they attach that result to the proposal alone, as though nothing else drove the buying decision. This is almost never true.

We need to be very clear about how we understand the End Game. It does not end with the submission of a proposal. A lot will happen after the proposal goes to the customer and before that customer selects a winner (see Figure 10-1).

Golden Rule #11:

When writing a proposal, writing is the last thing you should do.

One of the toughest things about writing a proposal is, well, writing a proposal. And it is especially difficult in technical organizations where engineers, scientists, and other technically oriented professionals have to write proposal sections because, at least in general, these types of people are visual, not verbal, conceptualizers. So when people who do not like to write and often are not very good at it are informed that they need to write particular technical parts of a proposal, they make the classic mistake of, literally, sitting down and writing. The thinking behind this approach is as straightforward and understandable as it is misguided: "The sooner I get started on this unsavory task, the sooner I'll be done." And, that is where the problems begin.

People who begin the writing process by writing do not understand that what they are really embarking on is a thinking process that will eventually lead to writing, but not right away. If they approach their writing assignments initially as thinking assignments, then later on, when they actually do begin to create the text, they will write faster, better, and less. That is a tremendous win for people who do not like to write. It is also a great win for the people in the customer's organization who will be reading this proposal. The writing will be better, and there will not be as much of it.

So first, we see overall business development as a process embodied in the game of chess: Opening Game, Middle Game, and End Game. Then we zoom in on End Game and discover a process there as well: 25-50-25 (Golden Rule #6). Finally, we zoom in again to focus on the crucial and difficult 50 percent period for drafting the body of the proposal, and there we find a process specifically designed for section writers. Notice that it is not until the last step in this process that the writer drafts the text, and that is the ultimate message made by Golden Rule #12: Faster, Better, and Less (see Figure 11-1).

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Figure 11-1

A best practice for debriefings is Post-Mortem Protocols through a process that actually adds value for both parties.

Golden Rule #12:

Win or lose, always debrief with the customer. If you have to choose, debrief after a win.

Ideally, of course, we should debrief after all wins and losses. Ideally. But it does not always work that way. Further, simply attending a debriefing does not ensure that what you learn will be worth much. After a loss, if all you ask the customer is "Why did we lose?" you may get a very quick and decisive answer: "Price." That is the quickest way ever devised for getting a loser out the door.

Likewise, if you just ask "Why did we win?" you may see a puzzled look on the customer's face. Why are you asking that question? And what am I supposed to say?

What we recommend as a best practice for debriefings, therefore, is to develop and implement Post-mortem Protocols that will lead you and your customers through a process for debriefing that actually adds value for both parties. They learn more about the marketplace they share with you, more about your competitors, and more about why they have made an excellent choice by selecting your products and/or services. In turn, you gain tremendous insight into what is driving wins and losses today—information you can use on future opportunities with this customer as well as other customers in the same market.

Certainly each debrief will need to include customer-specific and opportunity-specific questions, but certain questions always apply. If, over time, you get the same answer to a certain question 24 out of 25 times, you have identified a powerful signal from your market about what is making the difference between winning and losing. That is critical information, and the fact that you are gathering it becomes, in itself, a differentiator for you because almost no one else bothers.

Moreover, like so many tools we use today to win work, this one is both simple and effective (see Figure 12-1).

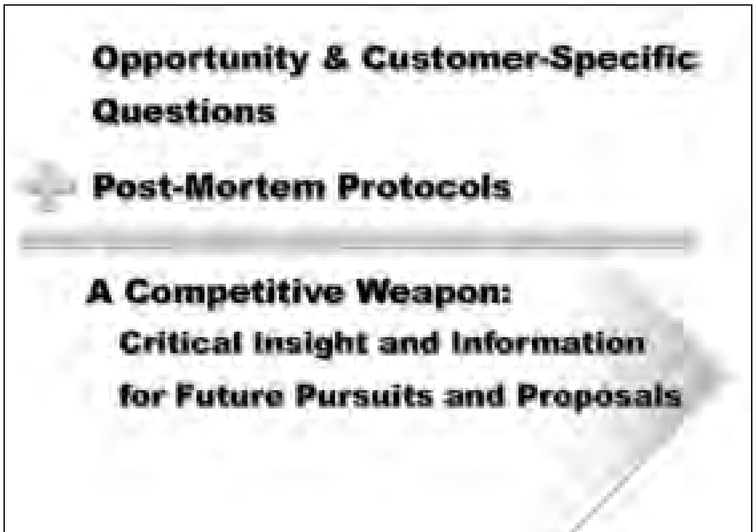

Figure 12-1

Note: Certain portions of an earlier Pugh article which appeared in *Contractor Marketing* magazine (March/April 2001) are incorporated into this journal article, reprinted with permission.

Golden Rule #13:

When capability becomes commodity, competition becomes communication.

The key to winning and building market share today is differentiation. It can take many forms, but we often choose only those we are most comfortable with. In a technical organization, for instance, the default effort to differentiate typically focuses on superior technology, and we trot out all the standard rhetoric of the technical shouting match: State-of-the-art, on the cutting edge, wrote the book, pushing back the frontiers, recognized industry leader, best of class. Best bells. Best whistles. And so on. And so on. This is sales "noise" in the customer's head

Thus, the customer hears and sees five competing companies all claiming to be the best technically. At some point, no one (at least in the customer's organization) really cares. All the solutions will be technically elegant, robust, reliable, and low risk. When this happens, the customer's perception moves to the most heinous word in the bidder's vocabulary: Commodity.

If you do a brutally honest assessment of your offer stacked up against the offers of your competitors and measured against what the customer truly needs (discussed as Sweet and Sour Spot analysis related to Golden Rules #2 and #3 above), only to find that ultimately there are no significant differences, you have just defined commodity. You have also discovered an important truth. You and your competitors all have a great message for this customer. When that happens, the competition is no longer about who has the best message. It is about who gets the message through the best.

Bottom Line? A great deal of winning and losing today is determined by which organization truly understands what the customer values as the optimum approach—i.e., the message they need to get—and then delivers that message better than anyone else. In very real and tangible ways, then, communication has become, and will continue to become, a powerful competitive tool for those who know how to use it.

Dr. David Pugh—an APMP Fellow—is co-founder and executive vice president of Lore International Institute, an organization that specializes in marketing, sales, and proposal training. He is one of the key architects of Lore's proposal development training and services. Dr. Pugh co-created Lore's recently released Proposing to Win Web site at http://www.lorewinsite.com/ (two weeks access available free). This site contains tools for developing winning proposals. Dr. Pugh can be reached at pugh@lorenet.com.

Article

Workplace-Classroom Collaborations:

A Role for Service Learning in Proposal Development

Service learning, a recent trend in workplace-classroom collaborations, enables short-staffed proposal developers to meet customers' needs while providing valuable workplace experience to students interested in careers in proposal management. By participating in service-learning programs offered by colleges and universities, APMP members can help train the next generation of proposal professionals.

By ROGER MUNGER, Ph.D.

If you are like many proposal managers, you are short on skilled staff, short on money, and short on time. For some, your need for trained staff is critical. However, universities do not produce students with degrees in proposal development. At most, students may enter the workplace with a course or two on "proposal writing" or "techniques for grant applications." Unfortunately, even these courses may not prepare students for a position on a proposal-development team. As most experienced proposal managers recognize, proposal development is an applied skill and there is really no substitute for first-hand experience. So what is a proposal manager to do?

For your next proposal, consider collaborating with university students on a service-learning project. Sometimes the word *students* conjures images of a gofer bringing coffee to staff, running errands to the mail room, and photocopying until late into the evening. Worse, the word may remind you of the time you spent trying to locate a student all morning, rewriting a sloppy document, or explaining a process for the hundredth time. These experiences do not have to happen. Students can bring much-needed enthusiasm, up-to-date knowledge, and hard-to-find technology skills. This article explores how you can benefit from a recent trend in workplace-classroom collaborations: service learning. This article also describes how you can make the service-learning experience beneficial to your organization and a learning experience for participants.

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What is Service Learning?

Workplace-classroom collaborations between industry and higher education have grown dramatically over the past two decades (Gerlach and Kingery, 1998). Working with industry clients on and off campus, for instance, students in these programs design online help for software applications, create brochures, publish newsletters, design Web sites, and develop proposals. Increasingly, colleges and universities are starting a special type of workplace-classroom collaboration called *service learning*.

Companies can fill immediate gaps in staffing and establish strong relationships with academic programs

When people think of service-learning projects, they often imagine cleaning a polluted river, working at a shelter, or teaching children to read. In the past, college students experienced service learning in such disciplines as education, health services, and sociology. However, more and more technical communication, writing, English, engineering, and business programs have started to combine service to industry partners and academic studies in their courses. The essence of a service-learning experience is the organized linking of academic study, workplace service, and reflection. Service-learning experiences are thus ideal for students who wish to learn corporate skills and gain valuable workplace experience *before* they graduate. Moreover, through such collaborations, companies can fill immediate gaps in staffing and establish strong relationships with academic programs. Through such relationships, companies are better able to recruit experienced workers.

Service learning is different from traditional internships in which students work more or less full-time at your company and report back occasionally during the semester. Service learning features a much stronger academic study component. Students participating in a service-learning experience meet regularly as a class, where they receive instruction, for example, on proposal development and have ample opportunities to discuss the proposal projects on which they are working. Industry partners benefit from this regular class instruction as well. Students are learning proposal-development concepts as they need them.

One way of understanding the potential for service-learning experiences to build the job skills you seek on your proposal-development team is by examining some of the findings suggested by adult learning theory. Malcolm Knowles' (1973) theory of andragogy (or adult learning) is perhaps the most influential. His approach to adult-learning theory offers useful principles that suggest that participating in service-learning initiatives is a useful way to build your future proposal-development workforce.

At its most basic level, adult-learning theory suggests that adults learn by doing. While a more complete treatment of adult learning is beyond the scope of this article, understanding the following general principles behind adult-learning theory can help proposal managers participate in successful service-learning experiences:

- Adults bring a wealth of experience with them to their studies and jobs.
- Adults are self-directed and have something to contribute.
- Adults are problem-solvers who prefer to focus on immediate and real problems, not academic case studies or scenarios.

If we accept the principles outlined above, service learning would seem to be a useful tool for helping students learn the principles of proposal development. Service-learning projects build on the existing knowledge and experiences students bring to advanced classes. In addition, these projects focus on "real world" workplace problems and require active problem-solving and self-direction to complete—skills proposal managers look for. For example, one student commented at the conclusion of a service-learning project, "My changes weren't just an exercise in a textbook, rather my changes made a difference in a real world context." With this focus on learning by doing, students gain valuable proposal-development experience as part of a structured academic study of the proposal-development process.

Service-Learning in Proposal Development

Service-learning courses in proposal development typically involve a group of students enrolled in a regularly meeting course, an instructor with some experience developing proposals, and a workplace client with a proposal project. Class meetings, readings, discussions, and activities provide the support the students need to help the client develop the proposal. Students may represent the majority of resources committed to a project or they may be just a few of many people working on a proposal. In both my graduate and undergraduate proposal-development courses, students plan, research, develop, and write several different types of workplace proposals. Depending on our client's needs, they have developed solicited proposals, unsolicited proposals, and internal organizational proposals.

Many instructors may have experience developing grants for education-related projects—few have experience developing large-scale proposals

The types of proposals developed are often influenced by the instructor's experience and are highly dependent on what types of industries exist in the community. While many instructors may have experience developing grants for education-related projects, few have experience developing large-scale proposals, for example, for the Department of Defense. This gap in experience is where APMP members can help. The instructor can provide expertise related to organizing the learning experience for the students and instruction on general proposal development skills. Representatives from the company can provide the specialized knowledge needed in their specific segment of the proposal development community.

For students to get experience managing the complexities of proposals, they need opportunities to work on actual workplace proposals

While class activities, readings, Internet resources, sample proposals, and guest speakers help students understand the general context, style, tone, organization, and format of different proposals, there is only so much students can learn about proposals from simulations and case studies (Dorn, 1999; Freedman, Adam, and Smart, 1994; Du-Babcock and Babcock, 1999; Forman and Rymer, 1999). Like much of the material I teach in my technical communication courses, proposals are highly dependent on the organizational context in which they are developed. For example, proposals submitted to private foundations are different from proposals requesting federal money. For students to get experience managing the complexities of proposals, they need opportunities to work on actual workplace proposals. “Such assignments, which ask students to complete workplace projects provided by clients,” Ann Blakeslee (2001) argues, “potentially preserve more of the culture of the workplace, while also allowing students to address a variety of audiences.” Consequently, service learning plays a significant role in my proposal-development courses.

In these courses, I usually find proposal opportunities for students before the class begins. Most of these opportunities come through word-of-mouth or my contacts in the local business community. I generally keep an eye out for likely proposal projects all year long. Frequently, I will get a phone call from a company looking for help. Unfortunately, the proposal development process does not always neatly fit into a 10- or 16-week academic semester. Consequently, I have to pass on some projects because the deadlines just do not match our academic schedule. Depending on factors such as the scope of the project and number of students enrolled in my class, students might work on a single project or several projects. A typical project generally lasts most of the semester. In the past, students have developed proposals in collaboration with industry clients in the community, student organizations, and various departments and offices on college campuses. Throughout the semester, students work closely with clients to develop these proposals.

Typically, as the instructor of the course, I am the person primarily responsible for each class session. However, periodically during the semester, I invite representatives from the company we are working with to visit class. Such class visits may take the form of informal visits in which the visitors attend class to learn more about what we are doing or to answer questions. During other visits, the client may deliver a planned presentation on a relevant topic. On some occasions, I have held a class meeting at the company site. Having representatives from the company attend a few class sessions and deliver presentations makes a huge impression on the students taking the course. They see such involvement as evidence that the company values their efforts and that they are working on projects that are valued. Clearly, visiting classes, preparing presentation materials, and working with students one-on-one takes time. However, it is just this sort of commitment that is crucial to the success of a service-learning course in proposal development.

Having students collaborate with industry partners on proposals has worked for both the students and their clients. Students, for instance, “begin recognizing the ways in which organizations are communities with their own networks, norms, language, and rituals” (Wojahn, Dyke, Riley, Hensel, and Brown, 2001). Moreover, students learn to successfully meet the demands of proposal-development projects. Recently, an undergraduate student wrote a winning proposal requesting more than $200,000 to upgrade a forensic lab at a police department. While such success is certainly modest in terms of monetary award, this student built on achievement and has been writing winning proposals for several years. Another student who worked on a proposal for a search-and-rescue squad reported that her service-learning experience was the primary reason she was hired at a company. By working with people, rather than just texts, students learn important interpersonal communication skills. Many students report that they are better prepared to contribute to multidisciplinary teams after participating in service-learning courses (Wojahn, Dyke, Riley, Hensel, and Brown, 2001).

While these service learning projects have yielded some encouraging results, I have learned after teaching proposal development courses for five years that there are some risks associated with such projects.

Understanding the Risks Associated with Workplace-Classroom Collaborations

Service-learning projects are not for every student. These projects frequently require students to visit off-campus sites for meetings and other activities. Some students might not have transportation. Other students might work at jobs that prevent them from missing any more work time than for the regular class meetings. It takes time to meet with clients, gather information, match meeting schedules, and handle last-minute changes. As proposal managers, we see this just as the reality of the workplace. Unfortunately, academic settings, constraints, and schedules do not always accommodate workplace realities. Thus, service-learning courses might not be appropriate for entry-level and introductory courses. Instead, I have found they are best suited for

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advanced courses. By the time most students enroll in advanced classes, they have a much more sophisticated understanding of workplace communication and are better able to collaborate with clients on projects that matter beyond a grade in a course. Good proposal developers seem to express themselves clearly in writing and speaking, attend to details while being able to see the big picture, handle the pressures of deadlines, and enjoy interacting with others. Students displaying similar qualities usually do well in service-learning courses.

Generally, clients from industry participate in service-learning courses for two reasons. First, they are interested in helping educate future proposal developers and, second, they need help on a project. Some clients are only looking for free labor and show little interest in the *learning* and *reflective* component of service learning. Clients who are more interested in getting a project done and less interested in helping students learn communication skills, in my experience, are likely to have expectations that significantly differ from those of the instructor and students working on the project. Service learning is a two-way street. Rather than representing free labor, students in service-learning courses volunteer their time and skills in exchange for the opportunity to gain valuable workplace experience. Clients, in turn, receive some immediate assistance on projects and help train the next generation of proposal developers. Some clients believe they can get skilled students to complete complex projects on tight deadlines for free. Faculty and students, on the other hand, treat projects as learning experiences in which mistakes can and do happen occasionally. When faculty, students, and clients are operating under different sets of expectations, all can end up frustrated.

Unless they explicitly discuss expectations, limitations, goals, and deadlines for service-learning projects at the start, clients and students may do more harm than good. As clients, you need to consider whether you have staff to adequately supervise the students. The students will need some mentoring; they are, after all, novice proposal developers. Sometimes clients do not allow for opportunities to interact with the students. Instead, they assume that the students will need no input or help from them (i.e., the *wind 'em up and watch 'em go myth*). This is not the case. Students are eager to learn about the profession and welcome your wisdom.

Looking back on the proposal classes I have taught, I feel the most important factor in determining if a workplace-classroom collaboration will be successful is the degree to which a company is genuinely interested in helping students learn the proposal development process. The type of company or location — I have taught in four different time zones, in rural communities to big cities — do not seem to be as big a factors as the commitment of company personnel to set aside time to share their knowledge with students.

You will also need to consider the proprietary nature of your proposal project. Projects that require a high degree of confidentiality might not be the best types of projects for a service-learning class. To be most beneficial, students will need to discuss their work with the instructor and other class members. Students should be given clear guidelines explaining the extent to which they can share their work with others outside your company.

Check with your insurance carrier to determine if additional insurance is needed

With the number of lawsuits rising in almost every sector of the workplace, legal risks are worth investigating before participating in a service-learning course. Because service-learning projects frequently require students to participate in activities off campus, legal issues are a concern. In addition, since most service learning is uncompensated, students are usually not covered by worker's compensation. You should check with your insurance carrier to determine if additional insurance is needed since your company may be responsible for the acts of students who are working on a project for your organization. Admittedly, I cannot capture all the legal complexities and concerns of service learning in this article. However, do not let legal concerns prevent you from working with students on proposal projects. While it is prudent to investigate these risks, in practice, it is fairly easy to mitigate them.

Recommendations for Participating in a Service-Learning Course

By attending to a few tasks before, during, and after a service-learning project, you can increase the value of the project to your company and the participating students.

Before Participating in a Service-Learning Course

Start by learning more about how service learning has been defined and used in other contexts. The Internet is an excellent place to find up-to-date and useful information on service-learning topics:

- **National Service-Learning Clearinghouse** (http://www.servicelearning.org). This site provides a wealth of information on service-learning opportunities.
- **Service-Learning Home on the Web** (http://csf.colorado.edu/sl/index2.html). Hosted by the University of Colorado at Boulder, this site "serves as a virtual guide to, and library of, service-learning." This site primarily focuses on service-learning in higher education.
- **Corporation for National and Community Service** (http://www.learnandserve.org/). Although largely focused

on K-12 service-learning, this site provides a variety of resources and links that are applicable to service-learning projects in higher education.

Use an Internet search engine (e.g., www.google.com) to find additional Web sites that focus on service learning.

Next, visit the Web sites of nearby universities and colleges. Start by searching for an established service-learning office/program or a service-learning coordinator. Contacting a coordinator is a good first step towards participating in a service-learning project. The service-learning coordinator will be able to put you in contact with the appropriate faculty who may be interested in offering a service-learning course on proposal development. If nearby universities and colleges do not have an established service-learning program, I recommend you contact departments directly. In my experience, English, technical communication, professional writing, and business departments are likely to offer courses in proposal writing and may have faculty interested in (or who already offer) service-learning courses.

Ask the instructor about what you can and cannot expect from the students

Participating in a service-learning course on proposal development requires some advanced planning on your part. Academic schedules are prepared months in advance. In addition, you will need to spend time meeting with the instructor before the course begins. I recommend you schedule a few face-to-face meetings with the instructor to discuss expectations. The instructor will be interested in learning the details about the proposal project on which you need help. You should ask the instructor about what you can and cannot expect from the students (and instructor) by way of skills. Similarly, the instructor will be interested in learning what type of interaction and support you will be able to offer the participating students. You will also want to discuss your project's objectives and deadlines.

Ann Blakeslee (2001) suggests that thinking through the following questions will "help instructors, in collaboration with workplace clients, to construct more productive experiences" in workplace-classroom collaborations:

1. What is the nature of your work?
2. How much and what kind of exposure will the students get to your workplace practices and documents?
3. What kind of tasks will the students be asked to undertake?
4. Where will they complete these tasks?
5. What resources will students need to carry out these tasks and what kind of access will they have to those resources?
6. How much structure and support will the students receive from their instructor, from their classmates, and from you and your staff?
7. How will students' work be evaluated? To what extent and how will you be involved in evaluating the project?
8. How often and when will you visit class, meet with the students, and review the students' work?

Also, in these early meetings exchange contact information, begin collecting project materials, schedule times for you to meet the class, arrange for a site visit by students (if appropriate), and start refining what you want students to do for you. I recommend collaborating with the instructor to write a *service-learning agreement.* A detailed service-learning agreement is a great way to ensure all participants are working under the same set of assumptions. Service-learning agreements (see example at left), approved by the student, faculty, and client, minimize the chances for conflict by having all participants articulate their expectations at the start of the project. The more detailed a learning agreement is, the less likely the chance of problems later on. Typically, these agreements specify the following information:

- Contact person (or supervisor) at the service-learning site
- Duration of the experience
- Time students are expected to spend on the project

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Service-Learning Agreement (Example)

For English 405—Proposal Development

Directions: The student, course instructor, and site representative should keep signed copies of this service-learning agreement.

I, Ginger Smith, agree to work with and under the direction of Carol Jones, the director of Skyview Technical Services (STS). This agreement began January 15, 2002 and will continue through May 3, 2002. I agree to work a minimum of 15 hours per week toward the completion of STS proposal projects, as defined by the director of Skyview and my course instructor. Part of my time will be spent in ENGL405, Proposal Development, participating in activities such as researching funding sources, planning strategies, creating story boards, learning proposal management software, writing, editing, evaluating works in progress, and creating graphics.

My duties will include planning, researching, developing, and editing a custom proposal or RFP response for a STS client. I understand I will need to work closely with the STS staff to develop proposal materials for submission no later than April 30, 2002.

In exchange for unpaid services, I expect to learn the following as a result of my service to STS:
1. The context, style, tone, organization, and format of proposals developed for STS global clients.
2. Strategies for the discovery or creation of materials typically required by customers.
3. Proposal-specific automated software tools and databases.
4. Ways to apply my proposal-development skills to address customer needs.

I also expect to collaborate with other STS staff as I develop proposals for the company. Such collaboration may include (but is not limited to) attending meetings, interviewing staff for information, creating support materials (e.g., request letters, organizational charts, budgets, etc.), conducting in-house reviews of materials, and submitting progress reports.

I understand the proprietary nature of the work at STS and will follow the company's confidentiality agreement. I also acknowledge that the materials I develop while working at STS are the property of STS and that I will need written permission from STS to use such materials outside of ENGL405.

I recognize that STS is depending on me to complete the work described above. I also understand that my failure to meet deadlines and complete my duties in a professional and timely manner may ultimately damage STS. Failure to abide by this service-learning agreement may result in my receiving a failing grade in ENGL405.

Student ______________________ Date: __________

Site Representative ______________________ Date: __________

Course Instructor ______________________ Date: __________

If you have questions or concerns about this service-learning project, you can contact the course instructor, Dr. Roger Munger, by phone at (208) 426-4211 or email at rmunger@boisestate.edu.

- Typical activities students will engage in
- Types of skills or knowledge students can expect to learn
- Consequences if students do not complete their duties in a professional and timely manner
- Contact information in case participants have questions or concerns.

Not only are these agreements opportunities for you, the instructor, and students to start talking about projects but they also emphasize the serious nature of working on projects that go beyond typical academic assignments. Now is also a good time to inform your company's legal counsel and get some advice. At the very least, have the service-learning agreement reviewed.

During a Service-Learning Course

"Early and continued interaction" with the instructor and participating students is crucial (Wojahn, Dyke, Riley, Hensel, and Brown, 2001). Rather than carefully controlled exercises with unchanging evaluation criteria and firm deadlines, service-learning courses represent "open-learning situations" (Mathews and Zimmerman, 1999). That is, the course can be unpredictable with requirements and deadlines shifting to meet the realities of working in an organization. Consequently, the instructor and students working on your project need to be in regular communication with you. As an instructor, I always worried when I had not heard from a client in more than a week or so.

Some students you work with on a project are just learning the nuances of interpersonal communication in the workplace as well as appropriate corporate behavior. For instance, students learn corporate expectations regarding how to dress, what to do if they are sick, and how to conduct themselves at meetings. While they may be skilled at academic tasks, they are still novices when it comes to interacting with people in a corporate environment. Consequently, some miscommunication and frustration are bound to occur. Lee-Ann Breuch's research (2001), for instance, suggests that some students interacting with clients may overrule or not listen to their requests. You can help prevent these missteps from occurring by clearly articulating the extent of the students' decision-making authority, providing as much information as possible about your specific requests, and encouraging students to discuss differences of opinion or approaches to a task (Breuch, 2001). Remember, part of what you are helping them to learn is how to effectively communicate with team members and manage conflict in the workplace.

Students are eager to learn why something is incorrect.

Students want to hear how they are doing periodically (Blakeslee, 2001). In fact, students are often proud of their work and need recognition from you (Breuch, 2001). While the instructor's grade and comments are valued, students also need to know if they are meeting your expectations. Students seem to value constructive feedback the most. While it might be tempting to take a red pen and mark everything that is wrong with a proposal draft, students may find such criticism overly critical (Blakeslee, 2001). Students are eager to learn *why* something is incorrect. Moreover, they appreciate learning about company-specific practices that are unique to your workplace but may be treated very differently at a competitor's company. Praise students for what they do well, in addition to identifying areas they need to improve. Probably your best method for responding to student work is to use the same techniques you use when you respond to the work of other people on your proposal team.

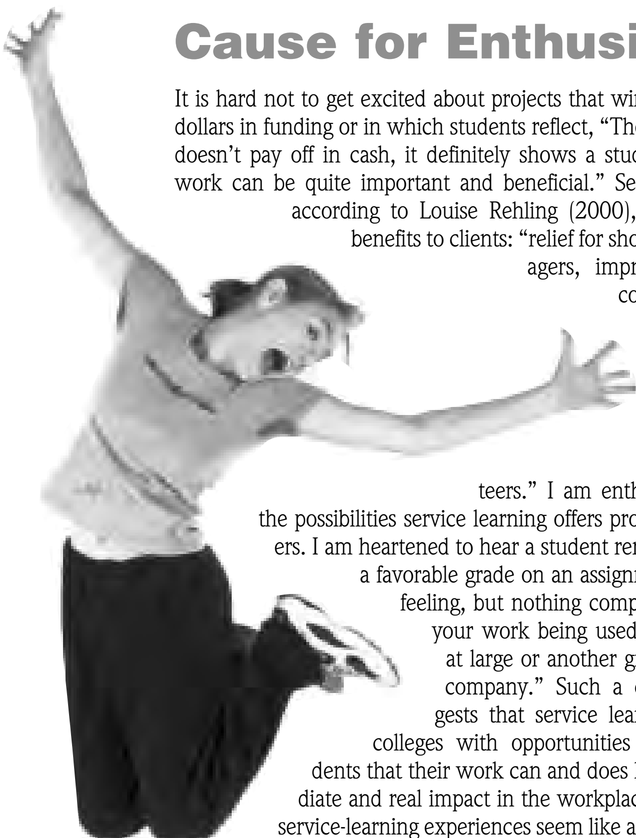
After a Service-Learning Course

Continue to follow-up on service-learning projects after the course is over and the instructor has submitted the students' grades. I recommend scheduling a debriefing session with the instructor. At this meeting, discuss what worked and what could have been done differently. Such discussions will help the instructor better work with proposal-development students in

future courses. If you are interested in participating in future projects, this meeting can also serve as a starting point for your next workplace-classroom collaboration.

Finally, follow up with the students you worked with. Keep up-to-date contact information on them and periodically send them, for example, e-mail messages updating them on your company's successes and inquiring about their career. Students who produced high quality materials and worked well with your current staff are valuable resources. Keeping open lines of communication with them puts you in an advantageous position when you need to add to your proposal-development team. Even students who had some problems fitting in with your company may provide your company with a good lead to a beginning proposal developer who *is* a good fit.

Cause for Enthusiasm



It is hard not to get excited about projects that win thousands of dollars in funding or in which students reflect, "Though the work doesn't pay off in cash, it definitely shows a student that their work can be quite important and beneficial." Service learning, according to Louise Rehling (2000), also provides benefits to clients: "relief for short-staffed managers, improved internal communications savvy, and new connections for support and volunteers." I am enthusiastic about the possibilities service learning offers proposal developers. I am heartened to hear a student remark, "Getting a favorable grade on an assignment is a good feeling, but nothing compared to seeing your work being used by the public at large or another group such as a company." Such a comment suggests that service learning provides colleges with opportunities to show students that their work can and does have an immediate and real impact in the workplace. In addition, service-learning experiences seem like an ideal way for APMP members to help students make the transition from learning the theory of proposal development to helping customers meet their funding needs. One student who worked on several client-based projects reflected on the importance of getting feedback from people working in industry as well as teachers:

"It was helpful to have the experience of working with someone who was not as invested in the theory behind some of the choices I made. When you are in school, constantly reading and analyzing texts and talking to others that are doing the same thing, it is easy to forget that sometimes clients don't care why you make a change — they just want the end result."

Finally, by exposing students to service-learning experiences while they are in school, you can help train the next generation of proposal developers. One student, for example, told me after a proposal writing course that had she not been exposed to service-learning projects, she might have never thought to use her written communication skills as a proposal developer.

When expectations are clearly articulated at the start of a service-learning experience, all involved stand to gain. Industry partners receive much needed help in developing proposals. While one course in proposal development does not prepare a student to lead a proposal team or equip them to be a professional proposal developer, students can learn skills valued by employers and begin making the transition from their roles as students to contributing members of a proposal development team.

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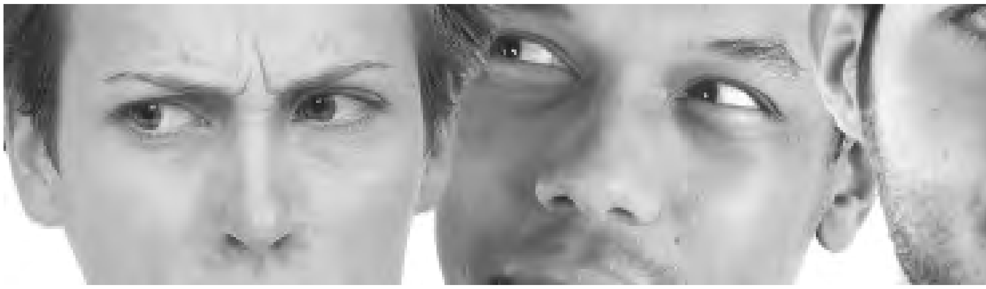
PROPOSAL SECURITY 101

The Basics of Managing Competition Sensitive Data



By DENISE RHEA-MCKENZIE

WHAT DATA IS COMPETITION SENSITIVE?

An organization's proposal information includes items that may have a high value to a competitor. Examples include capture and proposal plans, past performance, technical data, customer contacts, personnel capabilities, and financial records. These types of data need to be protected from disclosure by controlling how, where, by whom, and when it is generated, stored, or accessed. The specific data being protected are often identified in some distinguishing manner and labeled as "proprietary" or "sensitive." In some cases, formal control systems are established. An often over-looked area involves the protection of non-proprietary data of a seemingly harmless nature. These data, when combined with other information available to a competitor, may become important. For example proposal organization charts or phone directories developed to support communication among proposal teams can be valuable to an adversary's recruiters in identifying and contacting key staff.

Requesting and providing information to subcontractors and teammates is essential in the proposal development process, but how do you work in the "Team" environment, and yet protect that very data that can be used to ghost you in future efforts?

To produce effective and winning responses, a proposal team may spend countless hours developing and refining strategies, win themes, discriminators, technical solutions, management approaches, risk mitigation factors, and other information to include in a proposal. Many teams work in a collaborative environment, with ideas being discussed verbally or in documented presentations or briefings such as those in PowerPoint. Information discussed to develop an RFP response is considered proprietary to that proposal. Team members and prime contractors must have an understanding as to the disposition of all materials, whether captured and documented as hard copy materials or retained as intellectual property.

Proposal development professionals recognize the importance of working as a "Team" in the development of a response to a request for a proposal. Companies in a teamed environment must be able to freely exchange relevant information for a successful bid. However, once the bid has been submitted, what happens to the data?

1) NON -DISCLOSURE AGREEMENTS—PUTTING PROPOSAL TEAMS "ON NOTICE"

Teammates, subcontractors, and consultants working on a proposal team are usually required to sign a non-disclosure agreement (NDA) prior to obtaining access to, or developing any materials relative to, a proposal. A non-disclosure agreement encompasses all materials developed expressly for the effort they are currently working and, unless specified, can disregard other materials they may encounter or discover while conducting research for a specific proposal.

Capture and Proposal Managers should ensure that appropriate language is incorporated into non-disclosure agreements established for proposal development support. They should make certain specific tools, resources, and processes that companies will share with proposal contributors are incorporated in the NDA to ensure they are protected.

The Proposal Manager should establish a process to ensure that data provided to teammates, subcontractors, and consultants is thorough in its response, yet identified as proprietary for specific use, and therefore limits future use of these materials.

The information created and distributed to support proposal development is considered "proprietary" and "competition sensitive" for most organizations. If such information falls into the hands of competitors, it can put your company's livelihood—it's very survival—at risk.

Titan Systems Corporation, a primary provider of system support and products for National Defense, including the deployment of leading information systems, mission critical processes, systems engineering and support, and production of state-of-the-art communications & signal and imaging equipment, views data protection as one of the most important facets of proposal development. In this article, Denise Rhea-McKenzie, Manager of Titan Systems' Proposal Development Center reviews some of the basic tenants of securing your competition sensitive work.

2) DOCUMENTATION LABELING

One of the mechanisms the Titan Systems Corporation Proposal Development Center employs includes providing a "cover page", with a restrictive legend, for all materials and data sent outside the organization. Our cover page includes this legend:

"This document includes data that shall not be disclosed other than to employees of ***[Company Name],*** *on a need to know basis, and shall not be duplicated, used or disclosed in whole or in part, for any purpose other than to support* ***[Proposal or Business Development Effort Name]*** *This restriction does not limit* ***[Company Name]'s*** *right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained on all sheets."*

3) NON-DISCLOSURE PROCEDURES/REMINDERS

For proposal development, information will (and should) freely flow during team meetings and discussions. Restricting information in this environment can be counter-productive to developing a responsive, innovative and winning proposal. To protect information during team meetings and strategy sessions, Titan Systems ensures that personnel participating in meetings and discussion (1) have signed, active, non-disclosure agreements on file; (2) are currently working the proposal; and (3) understand the proprietary nature of the discussion. We developed a "sign-in" sheet that all attendees must sign, for ***every*** meeting. This sheet contains a statement that all information discussed is proprietary. We use the following reminder:

We, the undersigned, hereby acknowledge that the presentation by and/or discussions with Titan Systems ("Titan") regarding the XXXXXXXX Proposal (XXX), on this date, ***[date]****, contain information of a proprietary, confidential, and/or competition-sensitive nature. By signing below and attending this meeting, we hereby agree to not disclose to any third party any information presented by Titan on this date, and acknowledge that any such disclosure would result in substantial and irreparable harm to Titan.*

4) E-MAIL SECURITY AND RISK

The increased reliance on information has resulted in an increasing appetite for data and new collection systems. For most organizations, e-mail is the foremost methodology for requesting and collecting proposal information. Why is this a concern? Proposal documents moved over the Internet, either through e-mail communication, or via Web sites, can be more easily intercepted and disclosed outside the proposal team. Experienced hackers can access proprietary data in transit that users send and receive via e-mail and from a web.

While many people think of e-mail as a convenient alternative to a telephone conversation "and just as private," there is a big difference. E-mail is public and leaves a written record long after it has been erased. Any skilled person can recover the e-mail message's ghost somewhere deep in the bowels of a networked system. Pushing the delete button does not do much, because you can usually find a copy somewhere else on the system.

A simple search on the Internet using the term "e-mail security" will provide you with thousands of hits; articles, vendors and experts expounding their experience, view and recommendations

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about e-mail security. The bottom line, and the one area everyone seems to agree on, is that e-mail is not as secure as most folks think. Using this public form of communication for data as sensitive as proposal information can put your organization at risk.

5) Network Isolation/Encription

The Titan Systems Technical Resources Sector Proposal Development Center restricts access to proposal sensitive data, both from a teaming perspective as well as restricting that data from in-house or other Titan employees. By limiting access to materials used to develop a response to the proposal team, chances are lessened that the proprietary information for a specific proposal will be available for "public consumption".

We utilize a dedicated, separate networked system to host all proposal information. Users accessing our proposal network are restricted from accessing any other aspect of the Titan Systems networks, including our Intranet and in-house servers. The dedicated network ensures that all proposal materials are developed, stored and maintained in a secure environment with strict access controls to prevent unauthorized use. All of these access controls can be implemented all the way down to a granular level. For example, files and folders can be configured as such that only certain users will be able to open the files, and others will not even know of their existence. This control is implemented for both Titan employees and teammate personnel in our facility developing a proposal response. In addition, the proposal development system has built in document tracking, archiving, and tape back-up capabilities.

Our independent proposal network also supports our secure, web-based Virtual Proposal Center (VPC) tool. This tool is used to ensure access to our proposal information is maintained according to proposal roles and responsibilities.

The VPC, developed by Intravation, Inc., is a distributed, collaborative, workflow-enabled application that allows us to plan, manage, support, and simplify the proposal development process over both time and space. Our VPC server uses 128-bit Secure Socket Layer (SSL) based encryption to transfer all information and files to and from the server, using a web browser on any standard web browser..

Using a collaborative, secure environment to manage proposal documentation has the added benefit of controlling access to proposal information, thus ensuring content and proprietary data are protected.

For many small businesses e-mail is the only option. If your organization must use e-mail as a means of passing data among proposal teams, it is recommended that documents be encrypted or password protected using the capabilities included in most document publishing software. For example, Microsoft Word has the capability to limit or restrict access to a document to protect it from unauthorized access or changes, such as:

Requiring a password to open a document. To prevent unauthorized users from opening a document at all, you can assign a password. The MS Word on-line help file can guide users on how to require a password to open a document.

Requiring a password to modify a document. To allow only authorized users to make changes to a document, you can assign a password for modifying the document as well. The MS Word on-line help file can guide users on how to require a password to modify a document.

Applying a password to open or modify a document lets you send the file as an attachment via e-mail, while imposing some encryption capabilities to protect the data being sent via e-mail. Proposal teams would then provide document passwords during the team kick-off or status meetings. It is important to remember to provide the passwords in person rather than e-mail. Document passwords should be at least 7 characters long, with a combination of letters and numbers, upper and lower case. Document passwords should be maintained by the Proposal Coordinator and provided on a "need to know" basis.

6) Information Disposal—Policing the Trash

All proposal development organizations should discard confidential or proprietary data. Without the proper safeguards, information ends up in the dumpster where it is readily, and legally, available to anybody. According to the National Association of Information Destruction, Inc., the trash is considered by business espionage professionals as the single most available source of competitive information from businesses. Any proposal development organization that discards competition sensitive and proprietary data without the benefit of a formal destruction process exposes itself to the costly risk of loss of business. Without a program to control it, the daily trash of every business contains information that can be harmful. This information is especially useful to competitors because it contains the details of current activities.

The document destruction industry has been growing steadily over the past decade as businesses realize the importance of confidential document destruction. From a risk management perspective, the only acceptable method of discarding stored records is to destroy them in a way that ensures complete information obliteration.

For many organizations, information disposal is a trust issue. Knowing those companies that maintain a high level of integrity and discard or return data provided during proposal development, ensures consistent partnerships and business opportunities. Most proposal organizations have an established policy of data destruction for both hard and soft copy materials collected during proposal development. It is important to have secure "burn bins" available in the areas where proposal development is conducted. These burn-bins are large, covered trash bins, with a locking mechanism and slot for paper input. They not only protect the organization "hosting" the proposal development process, but all information created, developed, written and exchanged during this process.

The period of time that proprietary proposal data used for proposal development are retained is determined by a retention schedule incorporated into the Master Proposal Schedule. This process should take into consideration the data's useful value to the proposal effort after delivery.

Understanding and managing data that is proprietary and competition sensitive is one of the most important elements in proposal development. Ensuring that a proposal team has all necessary and relevant information to develop a response, yet protecting that data from future use is a key element in a successful proposal infrastructure. The methodologies and processes employed by a proposal organization should allow you to work with subcontractors and teammates in a collaborative environment, but afford the opportunity to ensure information is collected, maintained, distributed, and destroyed in accordance with best practices. Defined data management processes establish solid, committed, long-term relationships with teammates and subcontractors, and provide an atmosphere of synergy for proposal development.

Denise Rhea-McKenzie is the Manager of the Titan Systems Proposal Development Center (PDC) in Fairfax, Virginia. During her more than 19 years in proposal development and business acquisition support, she has worked at several large corporations in the Northern Virginia area. She implemented the Virtual Proposal Center, used throughout the Technical Resources Sector, to support both local and geographically dispersed proposal teams. Ms. Rhea-McKenzie serves as Proposal Manager on large proposal efforts and at the same time manages the PDC resources. She can be reached at drhea-mckenize@titan.com.

Article

Friedrich Nietzsche? For Proposal Professionals?

By JAYME A. SOKOLOW, Ph.D.

Today, bookstores are awash with self-help advice books claiming to apply the ideas of great thinkers to the business world. We have Machiavelli for managers and Sun Tzu's *The Art of War* for those ready to do battle in corporate boardrooms. But there are no business books about the infamous Friedrich Nietzsche. Could there be a link between Nietzsche and the lives and work of proposal professionals?

Nietzsche prided himself on his ability to "say in ten sentences what everyone else says in a book..."

Friedrich Nietzsche (1844-1900), who is often associated with the concept that "God is dead," is considered one of the most controversial and influential philosophers of the modern age. You can purchase excellent editions of his major works in New York City, Paris, Tokyo, and Kathmandu. Articles, biographies, and scholarly studies about Nietzsche seem to appear almost daily. Clearly, we are fascinated with Nietzsche, who prided himself on his ability to "say in ten sentences what everyone else says in a book — what everyone else *does not* say in a book."

He wrote many bold books on a wide range of topics — ethics, morality, Christianity, art, music, and the development of European culture — that gained him great notoriety soon after his death. Of all the nineteenth century's philosophers, Nietzsche still speaks to us today in a strong and uncompromising voice that is both contemporary and compelling.

"Nothing," he wrote, "has been purchased more dearly than the little bit of reason and sense of freedom which now constitutes our pride." Independence of mind was his greatest passion, but for Nietzsche intellectual autonomy always came at a great cost — self-examination and

In this book you will discover a 'subterranean' at work, one who tunnels and mines and undermines. You will see him – presupposing you have eyes capable of seeing this work in the depths – going forward slowly, cautiously, gently inexorable, without betraying very much of the distress which any protracted deprivation of light and air must entail; you might even call him contented, working there in the dark. Does it not seem as though some faith were leading him on, some consolation offering him compensation? As though he perhaps desires this prolonged obscurity, desires to be incomprehensible, concealed, enigmatic, because he knows what he will thereby also acquire; his own morning, his own redemption, his own daybreak*?*

Friedrich Nietzsche, Daybreak: Thoughts on the Prejudice of Morality, trans, R.J. Hollingdale, (Cambridge: Cambridge University Press, 1983), p.1.

self-mastery. In our lives and work, studying Nietzsche can help stimulate us to become bolder, more creative, more intellectually independent, and more willing to question our deepest assumptions about proposals. From a practical point of view, perhaps this is his greatest legacy to proposal professionals.

Nietzsche's Life and Writings

Friedrich Nietzsche was born near Leipzig, Germany in 1844. At an early age, he showed great brilliance in Greek and Latin and was appointed to a chair in classical philology at Basel University in Switzerland at the extraordinarily young age of 24.

Nietzsche taught at the university for ten years until poor health forced him to retire in 1879. With his modest university pension, he lived a lonely, indigent, and wandering life as a writer in France, Italy, and Switzerland. He published many essays and books before suffering a massive nervous breakdown in 1889 and remained mentally and physically paralyzed until his death 11 years later.

Ever since his death, Nietzsche's ideas and influence have been the subject of endless debate. The philosopher Walter Kaufmann, for example, considers Nietzsche to be one of the most beautiful prose writers and brilliant polemicists Germany has ever produced. In his many translations, essays, and commentaries, Kaufmann finds Nietzsche the advocate of a joyous, demanding, and trusting fatalism.

We get a less flattering portrait of Nietzsche from Jonathan Glover's acclaimed *Humanity: A Moral History of the Twentieth Century* (1999). For Glover, Nietzsche is a nihilist, a person who wanted "to preside at the funeral of any faith in a set of beliefs as the objective truth about things, or in external validation of anyone's way of life." Since for Nietzsche the world has no intrinsic meaning, we must create our own meanings and impose them on others. Glover sees Nietzsche as one of the main progenitors of Nazism and finds his advocacy of toughness, his rejection of compassion, and his belief in a pitiless self-mastery chilling, brutal, and repulsive.

No one disagrees about Nietzsche's importance. And no one would ever mistake him for Chuckles the Clown. Nonetheless, Nietzsche still has an astonishing capacity to provoke and challenge us.

Nietzsche's *On the Genealogy of Morals* (1887)

Unfortunately, Nietzsche published his books in the days before foundation and government grants. If he had been able to develop a few successful proposals to fund his writing and research, perhaps his life would have been more comfortable and less lonely.

Although we can safely assume that Nietzsche never wrote a proposal, every one of his books has plenty of advice for the discerning proposal professional. *On the Genealogy of Morals* (1887), one of his most accessible books, is Nietzsche's major work on ethics. The three essays in this book call into question our own contemporary moral values.

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The first essay vividly contrasts the morality of masters and slaves. According to Nietzsche, the word "good" was first associated with the life of warriors and aristocrats. It "presupposed a powerful physicality, a flourishing, abundant, even overflowing health, together with that which serves to preserve it: war, adventure, hunting, dancing, war games, and in general all that involves vigorous, free, joyful activity." This is what Nietzsche calls the morality of masters.

After the collapse of the ancient world, these values were challenged and replaced by their opposite — a slave morality. In contrast to the noble who lives in "trust and openness with himself," slave moralities shout that the "wretched alone are the good; the poor, impotent, lowly alone are the good; the suffering, deprived, sick, ugly alone are pious, alone are blessed by God."

The second essay examines the concept of guilt and bad conscience. Nietzsche did not believe that conscience is the voice of God in humanity. Instead, he called it "the instinct of cruelty turned backwards after it can no longer discharge itself outward." The instinct for freedom has been "pushed back and repressed." Now, according to Nietzsche, guilt and bad conscience mean that individuals are ashamed of their most noble instincts and have become weary, pessimistic, and mistrustful of the riddle of life.

The third and final essay examines the ascetic ideal, which Nietzsche believed dominated contemporary Christianity, philosophy, and academic life. Like bad conscience, asceticism calls into question and poisons "most dangerously our trust in life, in man, and in ourselves." Nietzsche, who has been repeatedly accused of nihilism, turns the tables on his accusers. It is they who are the real nihilists in their love of suffering and their loathing of all that is most vibrant and human.

For Nietzsche, there are two incomparable ideals of life and two moralities. The first is the morality of the ancients, whose highest values are vigor, courage, boldness, fortitude in adversity, self-discipline, and strength of character.

Against this moral universe, Nietzsche unfavorably contrasts the second: modern or slave morality, which he associated with a contempt for this world. Although Nietzsche is considered an intellectual revolutionary, in many ways he was the last great defender of the ancients, or at least his own very personal idea of ancient virtue. For Nietzsche, master and slave moralities will always contradict each other, and there is no possibility of reconciling them.

Nietzsche and Proposal Professionals

Nietzsche may never have written a proposal, but we can be sure that if he had written one, it would have reflected his unique prose style and polemical approach.

As a stylist, Nietzsche clearly has limited applicability for proposal professionals. In addition, probably few proposal professionals think that there is an inherent conflict between master and slave moralities. Probably even fewer have conceptualized their day-to-day work on proposals in this way. Nonetheless, I believe that if we read Nietzsche carefully there is plenty of practical advice for us to follow without having to call ourselves Nietzscheans, which I would not recommend as a career-enhancing strategy.

The chart on the previous page suggests some practical and direct ways in which Nietzsche's philosophy can benefit us as proposal professionals.

Although Nietzsche believed that we are governed by unconscious desires and drives, he also had great confidence in the power of reason to unmask our own delusions and what we call morality. With passion and eloquence, Nietzsche argued that individuals could have very positive consequences on their colleagues and organizations. He was certainly not blind to questions of hierarchy and power (what nineteenth-century Prussian could ignore it?), but Nietzsche fervently believed in the power of one. Little things and individuals could make a big difference, as Malcolm Gladwell has recently demonstrated in his national bestseller, *The Tipping Point* (2000).

The first is the morality of the ancients, whose highest values are vigor, courage, boldness, fortitude in adversity, self-discipline, and strength of character.

Ultimately, Nietzsche would have said, the best way to improve proposals is to improve ourselves. Our proposals can only be as good as the passion, intelligence, and capacity to question that we bring to them.

Nietzsche believed that our times called for a thoroughgoing re-evaluation of our work and our values. But it "would require habituation to the keen air of the heights, to winter journeys, to ice and mountains in every sense; it would require even a kind of sublime wickedness, an ultimate, supremely self-confident mischievousness in knowledge that goes with great health."

As proposal professionals, are we up to Nietzsche's sublime challenge?

Sources:

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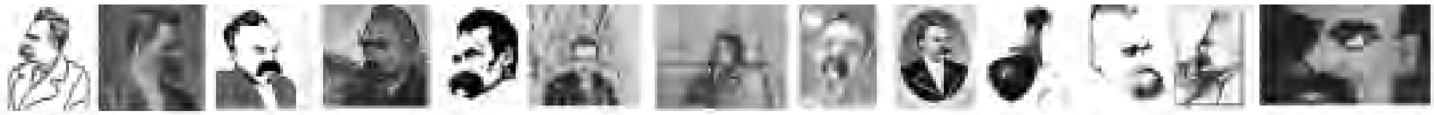

Nietzsche's Benefit To Proposal Professionals

Subject	Nietzschean Philosophy	Contemporary Application for Proposal Professionals
Morality of Masters	Nietzsche is the last great defender of the morality of the ancients, whose highest values are vigor, courage, boldness, fortitude in adversity, self-discipline, and strength of character.	Embracing these virtues can lead to: • Leadership • Peak performance • Better proposals.
Life Fulfillment	Life can be fulfilling when personality, expertise, and purpose converge. Nietzsche goes beyond Sigmund Freud's argument that "love and work" are keys to a satisfying life. For Nietzsche, love and work must be combined with a personal morality that affirms rather than despises life.	If you enjoy your work and find it personally satisfying, you will be happier and more productive.
Mission	Everyone must define the mission of his or her work. We must constantly ask ourselves fundamental questions, such as: What are the reasons that led us into our work? Are they the same reasons that motivate us now, or have we changed? And if so, in what direction?	Define the mission of your work. Ask yourself: • Do you enjoy your work and find it satisfying? • What are you most passionate about in your work? • Are your personality and expertise well suited to your job? • Is your organization compatible with your personality and expertise? • Are you making a positive contribution to your organization? • Is your employer making a positive contribution to your life and work? • If you are dissatisfied, what is the source? What are you doing about it ?
Models/Heroes	Throughout Nietzsche's works are portraits of individuals he admired and tried to emulate, such as the German writer Johann Wolfgang von Goethe (1749-1832) and the American philosopher Ralph Waldo Emerson (1803-1882). Admitting that he liked to philosophize with a hammer, Nietzsche admired Emerson's gentle serenity, cheerfulness, his quiet New England self-confidence, and his capacity to challenge us.	Identify heroes and try to emulate them. Don't confuse celebrity for heroism. Search for individuals inside and outside the proposal profession who have the capacity to inspire you to achieve.
Self-Examination	Unless we learn to be profoundly dissatisfied with ourselves, we will never be able to attain the self-mastery that is the foundation of lasting creativity and happiness. Without self-mastery, we cannot be productive or achieve independence of mind. In *Daybreak: Thoughts on the Prejudices of Morality* (1881), Nietzsche asked, "Why does man not see things? He is himself standing in the way: he conceals things."	Look yourself in the mirror and decide whether you are proud or embarrassed about what you see. We ask Red Teams to challenge the assumptions, themes, approaches, data, and means of persuasion in our draft proposals. How many of us, however, undertake the same kind of analysis of ourselves and our proposal teams?
Question Convictions and Beliefs	Nietzsche wanted us to constantly question our most ingrained beliefs and habits, believing that without questioning there could be no progress.	Tough questioning must be built into the core of the proposal development process, especially in the following areas: • Strategy • Key personnel selections • Red Team evaluations • Short- and long-range recommendations for improving the proposal process • Proposal lessons learned.
What is truly important?	Nietzsche recommended we focus attention on what is important in our lives with all the courage and strength of character we can muster, for "there is not enough love and goodness in the world for us to be permitted to give away to imaginary things."	When developing proposals, we must focus our attention on what is most truly important—our most profound convictions—and see them as potential barriers to success. By focusing on what is most important in the proposal development process, we can better ourselves and improve our proposals.

BOOKS

All the books featured in this edition address proposal development process. The first focuses specifically on the needs of the small business. A short excerpt from the third book, *Shipley Associates Proposal Guide*, was featured in the journal's previous edition (Fall 2001).
The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of the APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Book Review Editors Amy Bennington and Jennifer Parks.

Win Government Contracts For Your Small Business

By John DiGiacomo and James Kleckner
A CCH Business Owner's Toolkit Publication
CCH Incorporated, Chicago
© 2000, CCH Incorporated
ISBN: 0808005561
424pp. $24.95

Reviewed by
MARK WHITE
Director of Proposal Strategy and Presentations, DynCorp

Win Government Contracts for Your Small Business is recommended for any small business that has ever thought about capturing their share of the $200 billion awarded annually in government contracts. The purpose of John DiGiacomo's and James Kleckner's book is to help the reader understand the rules and the process, what to do and when to do it, and where to go for help to win government contracts. It is a step-by-step guide for small businesses. The book targets small businesses with annual receipts under $20 million, but anyone that works with the government will enjoy reading the book.

The authors cover everything, from capture planning to costing to what to do after you have won the bid. I learned everything from what the numbers in an RFP number mean to what most of the acronyms that I use on a day-to-day basis actually stand for.

The book is divided into four parts:
Part I: Leap of Faith—outlines the opportunities and ground rules.
Part II: Go For It: Ten Steps—delineates 10 steps to submitting a successful bid.
Part III: After the Bid—tells how the bids are evaluated and what happens next.
Part IV: Who Will Help Me?—lists detailed sources of assistance in winning contracts.

Part I (30 pages)—The first section describes the opportunities and what it takes to do business with the government. It is obvious that the authors have known businesses that have been in financial stress and thought that a large government contract would be their saving grace. I was very impressed with the authors for their unvarnished candor, explaining what a government contract can do for a business, and what it cannot do. They point out that contracts are not high profit or get-rich-quick schemes.

Part II (68 pages)—This section is the most valuable. It covers ten sequential steps for bidding on a government contract. It explains everything from how to market your business to the government and find appropriate contracts, to how to get registered as a small business, get bid leads, and submit a proposal. If I were helping a small business bid on a government contract, I would use these ten steps just as they appear in the book.

Part III (34 pages)—The third section covers what to do after you win a contract. It is broken down into the following sub-sections: Bid Evaluation and Award, Quality Assurance Standards, Contract Termination, and Getting Paid. I was very impressed with the section on Quality Assurance, and felt the authors explained ISO well. For any company that is ISO certified and markets that fact to the government, this section gives some pointers and explains the benefits to the government of being ISO certified.

The book is divided into four parts:

Part I: Leap of Faith—outlines the opportunities and ground rules.

Part II: Go For It: Ten Steps—delineates t en steps to submitting a successful bid.

Part III: After the Bid—tells how the bids are evaluated and what happens next.

Part IV: Who Will Help Me?—lists detailed sources of assistance in winning contracts.

Part IV (38 pages)—The last section is appropriately titled "Who Will Help Me?" It is a great reference tool for large and small businesses. It gives many government Web site addresses, and briefly describes each of these sites. It also goes into detail about some specialized departments that could help small businesses promote themselves. It gives names and phone numbers of contact people in every region of the United States (circa 1999).

Pages 171 to 424 are comprised of eight appendices and the index. These appendices, each of which is a valuable, stand-alone reference, include:
- Abbreviation/Acronyms
- Buying Offices
- Web Sites
- Procurement Technical Assistance Centers
- Federal Acquisition Regulation Outline
- Common Contracting Forms
- Numbered Notes
- Using the Freedom of Information Act.

I was most impressed with the way the book covered applicable government forms: it walked the reader through each form and explained how to fill out each part.

It is obvious that the authors have worked with many small businesses. They wrote in a manner and tone that make it simple and not so scary to work with the Government. I believe the book is as close as a small business can get to bringing in a high-dollar consultant to walk them through the process step by step. The book is logically organized, and provides great examples all the way through.

Win Government Contracts for Your Small Business is a very easy read because it is written in a well-organized and concise manner. It is a very detailed and well-outlined reference guide for all aspects of government contracts.

Perhaps the only flaw is that some of the good details in this book, like contact names and current regulations, will become outdated. So far, however, the information seems to be holding up well. For instance, the authors go into detail about Standard Industrial Classification (SIC) codes on page 45. On pages 51 and 54, they tell us about the planned change to the

North American Industry Classification System that took effect in October of 2000. The authors state that items may change and to check the Web site for updates. When I checked the Web site, I found no new revisions of the book.

Some of the book's text can be accessed at www.toolkit.cch.com under the "SOHO Guidebook" header. The Internet copy does not have all the supporting graphics, and visitors must read the sections in bite-sized chunks (one- to two-page), but text passages appear to be the same. Though the SOHO Guidebook's topics are listed in a different order and do not flow as logically as the published book, readers may want to peruse the online version to preview the depth of content and style.

Small business owners and their marketing and proposal staffs can all benefit and profit from the guidelines and information in this book.

Sales Proposals Kit For Dummies (with CD-ROM)

By Bob Kantin
© 2001 Hungry Minds, New York, NY
360 pp. $29.99 (Price includes CD ROM)
ISBN 0-7645-5375-5

Reviewed by
JENNIFER PARKS
Senior Proposal Coordinator

The *For Dummies* series is perhaps the most popular series of reference guides available, with topics ranging from baking to car maintenance to personal relationships. These books have gained a large following by presenting information in a humorous yet thorough, real-world style that maintains the reader's interest while imparting invaluable information and step-by-step instructions.

Sales Proposals Kit for Dummies is another masterpiece from the *For Dummies* people. The book starts with a removable "cheat sheet" on the first page, outlining Kantin's five steps for building a winning sales proposal. The cheat sheet summarizes these steps and provides checklists of vital information on the flip side: a checklist of what goes into a proposal transmittal letter; when to use a letter as your entire sales proposal; how to write a winning title on your proposal; and four steps to a solid executive summary.

Sales Proposals Kit for Dummies is divided into six major sections, with chapters that cover specific sub-topics. The sections are:

Part I: Integrating the Sales Process: How the sales proposal is an integral part of the entire sales process.

Part II: Making the Parts of a Great Sales Proposal: This section explains the five-step structure of a great proposal. This is the nuts and bolts of the book. Kantin's five steps for a winning proposal are as follows:

- *Background Information*—learning all you can about the buyer.
- *Proposed Solution*—How your product is a workable, cost-effective method to solving a problem the buyer has. This piece of the proposal is where you should answer the buyer's question "What's in it for us?"
- *Implementation*—In the third section of a winning proposal, you should minimize the buyer's feeling of risk by explaining how you intend to implement your proposed project.
- *Seller Profile*—The fourth section of your proposal should be used to convince the buyer that your company is the right choice. This is where you would include such information as references, a mission statement, and a corporate overview. Kantin also addresses how to title this section and what subsections you should use.
- *Business Issues*—In the last section you should include your assumptions, fees or prices, and invoicing schedules.

Part III: Details, Details and Presentation! Detailed information on title pages, tables of contents, executive summaries, and other important elements of great proposals that are supplementary to the five pieces of the actual proposal.

Part IV: Getting it Right the First Time: Presents the roles and responsibilities of each person on the proposal team; the steps to develop the proposal; and a rating tool to evaluate your proposal from a prospective buyer's standpoint.

Part V: Selling on the Inside: the Internal Sales Proposal. This section describes the process for writing an internal sales proposal for senior management when you have suggestions for your company (purchasing new software, improving an existing process, etc.).

Part VI: The Parts of Tens: In this section, Kantin outlines several important issues in lists of ten. Included are Ten Surefire Ways to Make Your Proposals Close More Deals; Ten Things a Buyer Expects to See in Your Sales Proposal; and Ten Tips on Presenting Your Sales Proposal. Each is full of concise, specific hints and usable tips.

Part VII: Appendices: Appendix A lists numerous books and Internet resources related to selling and proposals; Appendix B provides installation and troubleshooting instructions for the included CD.

The CD-ROM contains numerous tools, examples and demonstration software, including a demo of the Sales Proposal Rater program.

Kantin uses numerous real-world examples to support his points, although the writing alone does a great job.

Sales Proposals Kit for Dummies is one of the best, most useful books I have read. The tone and style of the author's writing is easy to read, uses layman's terms, and is very concise. The book's format is never dry or boring; in fact, I read it all in one sitting.

I fully intend to use this book when creating future proposals. It would be a great addition to any commercial proposal group's library.

"Sales Proposals Kit for Dummies is one of the best, most useful books I have read. The tone and style of the author's writing is easy to read, uses layman's terms, and is very concise. The book's format is never dry or boring; in fact, I read it all in one sitting."

more...

Shipley Associates Proposal Guide for Business Development Professionals

By Larry Newman
Shipley Associates

274 pp. Suggested Retal Price $49.95
ISBN 0-9714244-0-3

Reviewed by
TODD PETERMAN
Senior Proposal Coordinator

It is difficult to write a reference book. The scope of a reference book is often so wide, even within the context of a specific subject, that one is forced to juggle many balls at once. One hopes to not only successfully keep all the balls in the air, but also to have all the necessary balls in the air to begin with.

It is also difficult to review a reference book because the scope cannot be read in a progressive, linear fashion, as can most other books.

This reviewer is currently writing a general proposal that gives a product's overview in a way that can be used when no formal written proposal has been requested. I therefore decided that the best way to review the *Shipley Associates Proposal Guide for Business Development Professionals* by Larry Newman was to take the book for a test drive. What better way to test the book's efficacy than to put it into immediate practice, to see if both the book's principles and practices worked?

The Shipley Associates Proposal Guide has three self-proclaimed aims, which are to:

- Help individuals and organizations win competitive business more effectively, efficiently, and consistently.
- Offer clear guidance to business development professionals that is practical and easy to find.
- Record best-practice guidelines.

For the purposes of this review, these second and third aims are immediately germane.

As a beginning approach, I perused the book's format: an alphabetical and cross-referenced guide to general and specific concepts within the world of proposal writing. I had a few general concepts and some specific topics in mind that I wanted to research. The alphabetical arrangement of all concepts and ideas allowed me to find my first topic quite easily.

I wanted to know which process of proposal writing was recommended as most efficient.

I quickly found the section marked "Process." It contained a graphic list that encapsulated its specific points. I read the list and was immediately able to understand the author's train of thought. Following this graphic, each point was elaborated in its own minor section. Since the explanation of the process was written in a linear manner, I found that reading the entire section actually helped to cement the general concept. The writing was vibrant, concise, and useful. One of the cross-references even directed me to my next topic of interest, the "Proposal Management Plan."

Again, the beginning graphic and text guided me through all points to be covered. This allowed me to choose which points I wanted to focus on, and which I could come back to in the future.

The next topic I wanted to read about was "Graphics." Once again, the alphabetical arrangement allowed me to find the topic quickly and scan its salient points. I found this section's text interesting and the accompanying graphics compelling. The cross-references interested me in further reading, and so I found myself referencing other related subjects to further enhance the text of the "Graphics" section. This section pointed the way to related sections, including "Customer Focus," "Color" and "Action Captions." I not only found a wealth of useful information, but also found that all the information was cohesive.

In the course of this review, I found that all of the subjects that I wanted to research naturally fell into line due to the book's format. It built a gestalt of presentation logic that can be a valuable resource to all those who write, market, or even speak for a living.

Although a natural skeptic, I was delighted by this book, primarily because the author practiced what he preached on every page.

The design of the book is interesting and accessible, the text is crisp and useful, and the principles are logical and dynamic.

I believe the book's second and third aims really hit their target. The first aim, of course, really depends on the reader. But because this is a book that a proposal writer can truly use and recommend, it could well help the user meet that first aim, to win competitive business more effectively, efficiently, and consistently.

In the course of this review, I found that all of the subjects that I wanted to research naturally fell into line due to the book's format. It built a gestalt of presentation logic that can be a valuable resource to all those who write, market, or even speak for a living.

Developing "In-house" Proposal Tools

Over the past few issues, the Commerce/Products Column has brought you a number of reviews of commercial proposal development tools. The marketplace continues to expand and there are currently dozens of products that could potentially help organizations produce effective proposals in an efficient manner. However, there is another very viable alternative to commercial-off-the-shelf (COTS) products that we have yet to explore — developing your own proposal tools.

The following is a case study of experience at CACI International, Inc., developing proposals and proposal-related tools for use by its corporate proposal group personnel and line organizations.

By GREG WILSON, CACI

A Case Study

CACI is a large information technology company with approximately 5,700 employees and $650 million in projected revenue for fiscal year 2002. The vast majority of CACI's revenue comes from contracts with the federal government, including the Department of Defense. Most of this work is acquired by responding to Requests for Proposals (RFPs). Over the years, they developed a defined proposal process and an experienced Proposal Group. The group consists of proposal managers, writers, editors, and graphic artists supporting corporate proposals and responding to requests for support from line organizations.

CACI wanted to leverage the strengths and capabilities of new technology into its proposal process. Like any other company, it faced a decision: should it buy a commercial proposal product, or develop its own?

Why Develop Your Own Tool?

This is a fair question. Why would CACI invest time and effort to develop its own proposal tools when there were so many available on the commercial market? By purchasing commercial software, the company would benefit from a product geared specifically to managing, creating, and organizing proposals, and driving the proposal process from beginning to end. These products are extremely powerful. Unfortunately, they can be fairly complex and surprisingly rigid, and they are very often not used to the full extent of their capabilities. Work forces are very often reluctant to adapt to using a new tool, and extensive training and trial use may be necessary before the product can be fully implemented. These products can also be costly. A quick analysis of the survey presented in the Spring 2001 issue of *Proposal Management* indicates that the average cost of installing a commercial proposal automation product for 15 users is $15,000 to $20,000, excluding maintenance and subsequent upgrades. Given this sizeable investment, particularly for small- and medium-sized organizations, many proposal groups have opted to develop their own tools.

The entire company uses a Lotus Notes environment, which provides an excellent infrastructure for developing proposal tools and eliminates the need to buy new software specifically designed for proposal development. All company functions, from Human Resources to Accounting to Project Management, use some type of Lotus Notes database to support each function. Developing tools in Lotus Notes for the Proposal Group was a logical course of action.

By creating in-house tools using this existing electronic infrastructure, the company realized the following advantages: no up-front cost for implementing commercial software; customized tools developed according to user requirements; and company-wide availability.

The set of tools CACI developed and implemented for proposal work began with simple, obvious tools such as resume and past performance search engines, and grew to include advanced proposal aids such as Proposal Manager tools and evaluation aids. The full tool set evolved over time. Proposal personnel currently maintain the tool set, and company Lotus Notes programmers perform significant design changes.

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In-house proposal tools

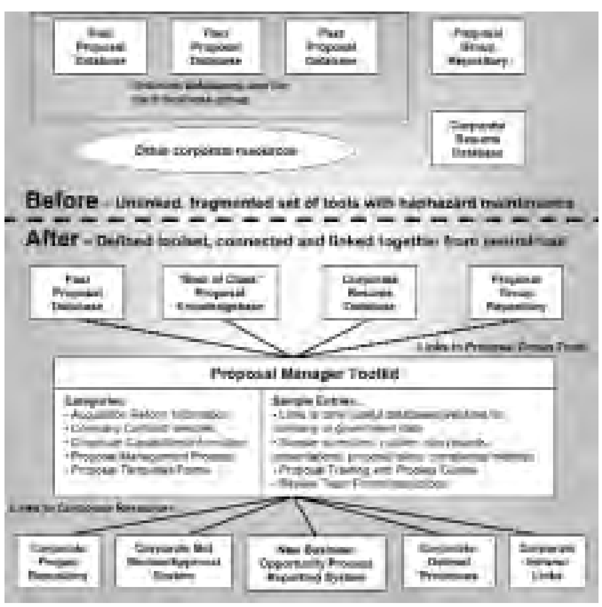
Tool Type	Description
Simple Repositories	Probably the most common type of in-house tool. Most organizations have some type of stored corporate data that is searchable for proposal purposes. The types of items most often stored include resumes, corporate experience, contract descriptions, and past proposals. Simple repositories can usually be searched, but they are very often only a collection of files or entries that are not organized, updated, or separated into categories. This limits their usefulness because it can often take quite a while to search. *CACI Examples: None*
Complex Repositories	Complex repositories with methods to categorize data entries. Fields are constructed and entries are categorized so the user can drill down to a much more detailed set of entries. Powerful fielded and Boolean searches are also available. At CACI, individual proposal repositories are created for each contract opportunity. Proposal repositories contain all data associated with the proposal, grouped into logical categories. *CACI Examples: Resume Database, Past Proposals Database, CACI Project Repository, Proposal Repositories, Proposal Manager Toolkit, Best of Class Database*
Organization/ Management Tools	These tools allow the proposal manager to exercise complete control over the proposal document. Different sections of the proposal are assigned to different authors. The authors are directed to post periodic drafts to the tool, in the specified area. Through differently assigned access rights, only certain people can attach sections to their assigned area. A Proposal Manager is normally in charge of this tool, and is able to get an instant proposal status using the “Organizer” or “Manager” tool. *CACI Example: Proposal Database*
Evaluation Aids	Evaluation aids are like organization/management tools, in that different sections of the proposal are posted to an assigned, specific category. Review team members are given access rights to certain sections, where they can score the documents, provide suggested changes, and make comments. The entire process can be done electronically, without the mass of paper usually associated with review teams. *CACI Example: Proposal Database (review team function)*

Types of In-house Proposal Tools

As shown in the table above, in-house tools within most corporate tool sets that are used to support the proposal process can be separated into four categories: simple repositories, complex repositories, organization/management tools, and evaluation aids.

CACI’s Toolset

Previously, the company’s proposal resources and information were either not available or found only after an exhaustive search of various databases. These databases were not located in a central repository. The organization of the information was fragmented, and maintenance was not always a priority. Sometimes this search was performed manually, and required a significant time investment. Relying on the legacy knowledge of long-time employees was often the most effective means of gathering proposal data. The system worked, but it was cumbersome and inefficient. A before/after representation of CACI’s proposal toolset is depicted in the figure at right.



The new company proposal toolset provides a single point of entry—the Proposal Manager Toolkit—which provides direct access to all proposal and corporate resources.

To evolve the “before” approach into the “after” toolset, they:

- Grouped past proposals together in a central repository, enabling personnel to include all company proposals in a single search.
- Established links between tools, and a single point of entry.
- Made commonly-used items available in a single repository.
- Identified and created links to other corporate resources that were not specifically developed for proposal use, but which contained useful information.
- Established an access control system (a feature included in Lotus Notes).
- Established maintenance and development assignments.

The primary goal behind developing the toolkit was to support line organizations in quick turnaround, smaller proposal efforts. These efforts did not warrant direct corporate proposal group support, but still required some guidance. The following paragraphs describe some key features of a proposal toolset that CACI developed to support this goal (where possible, the resources required to develop each tool are identified. In most cases, however, precise information was not available).

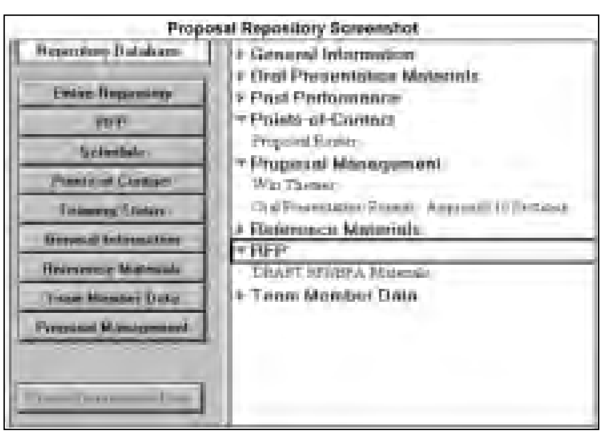
Proposal Manager’s Toolkit. The central point of entry for this tool set is the *Proposal Manager’s Toolkit,* a resource that provides "one-stop-shopping" for anyone who requires proposal resources. The toolkit includes all the capabilities one needs to manage a proposal. Process information, sample documents, checklists, templates, and links to other corporate resources are included.

The toolkit has become very popular throughout the company. As line organizations have discovered the tool, the number of requests for information that normally come into the proposal group has declined. The Toolkit has more than 120 entries, in five different categories, and is continuously maintained and updated by proposal staff. Initial functional development required approximately 60 hours of proposal manager time. Maintenance averages one hour per week.

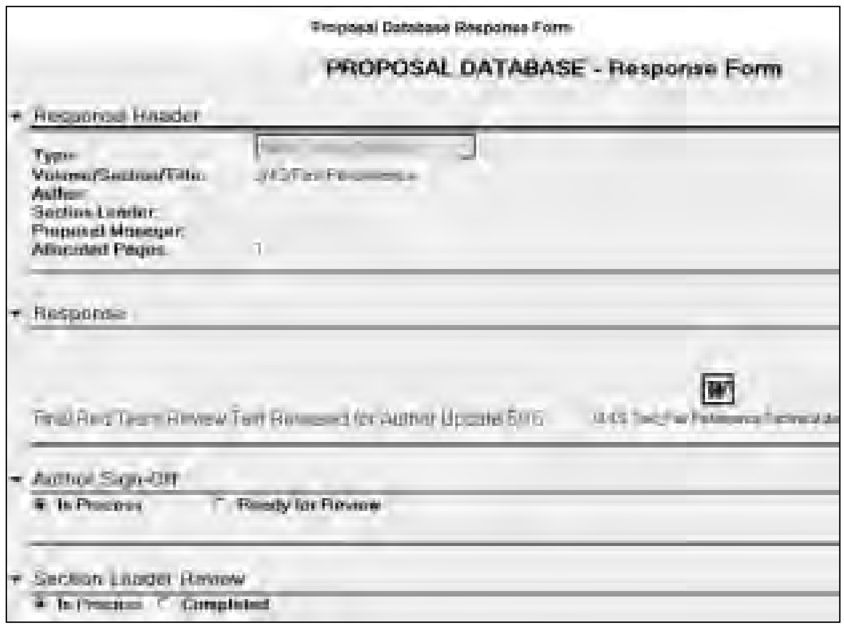
Best of Class Proposal Knowledge. Another useful and popular tool is the *Best of Class Proposal Knowledgebase.* This repository within the toolkit is populated with the very best company proposals, sorted by proposal section. Categories include: Technical Approaches, Management Plans, Corporate Experience/Past Performance, Personnel Plans, and Sample Tasks. This tool is not meant to be a repository for technical information, but rather a resource containing ideal approaches for various proposal requirements. It is updated via a brief survey distributed to Proposal Managers. Using the survey, managers identify best of class candidates for inclusion in the knowledgebase. Proposals over three years old are removed, and new entries are posted. The entire update process takes between 1-2 hours quarterly.

Proposal Repository. CACI has also developed proposal section management and evaluation tools using Lotus Notes. The *Proposal Repository* is used as a company standard on every proposal. It contains all information related to a particular proposal. Users can create entries under any of its pre-defined categories, or create their own. Only those with rights (usually the Proposal Team) can view the data. The proposal manager uses the access control functions available in Lotus Notes to give different team members different levels of access. Proposal repositories can be viewed by anyone with the required access rights, from anywhere in the world. For large proposals, this tool often contains hundreds of entries in dozens of different categories.

Proposal Database. This additional tool is often implemented on large and complex proposal efforts. The *Proposal Database* serves as both a proposal section management tool and a review tool. It is the most advanced proposal resource in the company's toolset, and required a significant amount of programmer time to develop and refine. The Proposal Database is set up by the Proposal Manager, following the final proposal outline. The manager creates each "section control form," which contains the outline information, the section author and the volume leader. In the default setting, only the section author, volume leader, proposal manager, and review team members have access to the section entry.



When the control form is complete, the tool allows the user to create entries for a storyboard submission, a red team submission, and a final gold team submission. In each submission form, a space is provided for the author's response, the reviewer's sign-off and comments. A different level of review is used for each stage of the proposal process. Once a reviewer has signed off on a section, the next level reviewer is notified that the section is ready for review. The entire process is automated, and can be accessed from any location. The author response and subsequent sign-off process can be seen in the Proposal Database screenshot below.



A Successful In-house System

CACI has researched a number of commercial proposal products, but has found none that can adequately and cost-effectively replace the in-house tools currently in use. The toolset was thoughtfully developed over a number of years, and this development addressed specific needs as they arose. CACI did not try to implement a full set of proposal support resources at once. The natural progression of added functionality helped employees gradually become accustomed to using each tool. This phased implementation and the fact that the system is based on the company's standard Lotus Notes tools has contributed to excellent user adoption of the toolset.

The response from proposal managers and from other line managers has been tremendous. Many line organizations have realized B&P savings on smaller proposals because they often are able to rely on the proposal toolset alone, and do not need support from a corporate proposal manager. The toolset is a timesaver for proposal personnel — everything they need to do their jobs is at their fingertips, allowing them to devote more time to developing solutions and providing a quality submittal.

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	Commercial Products	In-house Tools
Strenghts	• Robust tools with impressive number of features. • Extensive documentation, impressive front-ends, and maintenance support. • Can truly automate the proposal process.	• Usually do not involve a significant investment. • Developed by and for users. • Are flexible, customized, and address the specific needs of the proposal organization. • Employ the "common sense" approach, and do not contain unnecessary options. • Can often be developed using previously purchased software.
Weaknesses	• Require significant investment of company resources, including a financial investment and time investment for employee training. • Are sometimes very complicated and overwhelming to the new user. • Often suffer from a lack of flexibility.	• Do not carry the large number of options and features, support documentation, and maintenance services that are present in most commercial products. • Harder to "upgrade," and frequently use older software because they have been slowly developed over time.

Should You Develop Your Own Tools?

When deciding whether or not to develop your own in-house tools, consider the following:

- You may already have the software necessary to develop your own proposal tool set. The development tools, required licenses, and service agreements you need are very often those same products the company has already purchased. Such products can include Microsoft Outlook or Access, Lotus Notes, or any one of the numerous search engines available on the market. However, while researching this article, the author discovered that most companies do not develop their own proposal support tools. None of the proposal professionals contacted had developed their own custom-made software.
- In-house tools are usually developed over time, as needs arise. A foundation is built, and other modules are gradually implemented. This can be a disadvantage. Being slowly developed over time means that in-house tools do not take advantage of the latest advances in software. For example, the toolset does not use Web-based technology, which would greatly enhance the tool's availability and ease of use. To stay commercially viable, most proposal management software vendors are incorporating Web technology into their products.
- Very often, users are the primary developers of in-house tools. The services of a programmer may be necessary at the outset to lay the foundation, but ideas for features and add-ons, as well as population and maintenance, is usually the users' responsibility. This benefits users and makes excellent tools in a number of ways. Involving the users in the development process means that they already have the training necessary to use the tools when they are fully implemented. Being part of the development process encourages users to make full use of the tools, and eliminates the sense of apprehension and hesitation that users often face when they are exposed to a new idea. They already know the tool and how it can help them do their job. User buy-in is one of the most significant advantages of in-house systems.
- The in-house tools developed by some companies did not have an impressive list of add-ons and features that is usually present in commercial products such as RFPMaster and ProposalMaster (Sant Corporation), RFP Machine and Proposal Assembler (Pragmatech Software, Inc.), Deltek Proposals (Deltek Systems, Inc.), or Virtual Proposal Center (Intravation, Inc.). Overall, in-house tools are usually not as robust as these commercial products. They most often start from a database of company experience and resumes. They sometimes aid in making proposal items readily available, categorized and itemized in a single repository. They sometimes assist in the review and evaluation process. They very rarely involve complex processes such as automatically parsing an RFP or creating a first draft at the press of a button.

There are many advantages to developing your own proposal tools. Using a common sense approach and available software, companies can implement an excellent set of proposal resources.

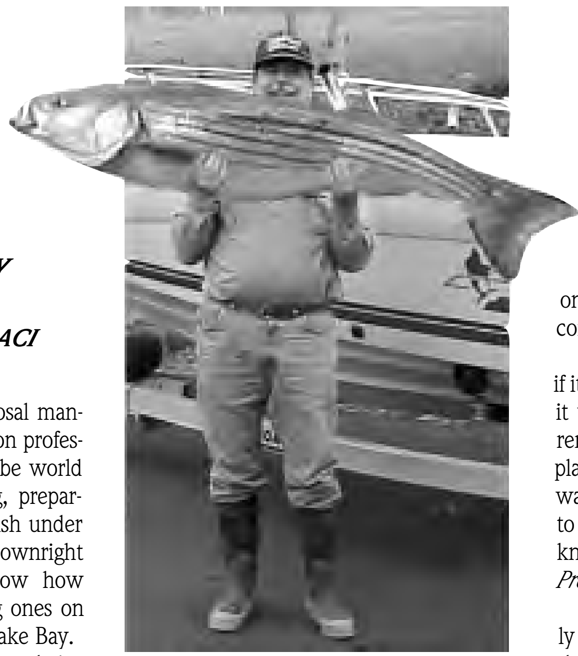
The basic strengths and weaknesses of commercial and in-house tools are summarized in the table above.

There are many advantages to developing your own proposal tools. Using a common sense approach and available software, companies can implement an excellent set of proposal resources. They probably will not approach the level of complexity and automation available via commercial proposal products. Consider and research both options carefully when deciding which strategy is right for you.

Greg Wilson is a proposal professional at CACI, Inc. He writes reviews of various proposal automation products for *Proposal Management*. (The views expressed about such products are those of the reviewer/author and do not necessarily reflect the views of the APMP.) Mr. Wilson can be contacted at gwilson@caci.com. If you would like to recommend topics or products for review, please contact him or the Managing Editor.

ToWit

Reeling in the Big Ones



By ERIC GREGORY
Vice President
Proposal Development, CACI

I know for a fact that many proposal managers and new business acquisition professionals in our industry aspire to be world class fishermen—plotting, planning, preparing, strategizing, and catching big fish under circumstances that are at times downright inhuman and difficult. I also know how rewarding it feels to reel in the big ones on nearby lakes, rivers, or the Chesapeake Bay.

What might be less obvious is how being a competent fisherman as opposed to being a "duffer" has served as a helpful metaphor in my pursuit of new business, something that my "fishing" or "fishy" statistics actually bear out. My assertion is this: reeling in the big ones is very much the same whether you are talking about fish or new business.

Getting Out In Front of the Big Ones (Fish + Location)

I wouldn't think of pursuing the big ones without devoting a fairly healthy amount of time to advanced planning. When I hit the lake, even one I am very familiar with, I will have developed a comprehensive plan built around the species of fish I am going to concentrate on that day. For this exercise we will default to America's fish, the largemouth bass. I do this by assessing time of year (this determines whether the fish are in pre-spawn, spawn, post spawn, summer, or fall patterns of behavior); daily environmental factors such as weather, water temperature, and water clarity; examining a topographical map and locating structure (underwater features) likely to hold fish given the other conditions I have assessed; and selecting a variety of lures I believe will be productive under the given conditions on the type of structure I have selected to concentrate on that day.

Of course, I build flexibility into my plan if it doesn't quite work out the way I thought it would based on my initial assessment. I remain adaptable and have a back up plan in place I can go to quickly when I get on the water and have to make some adjustments to my original plan. This technique is known as *FLP: Fish + Location + Presentation = Success.*

When I do this and do it well I generally have a successful day landing nice fish in abundant quantity. This results in what I call a "Tournament Day": five largemouth bass averaging more than 3 pounds each.

When you want to land a big deal, your advance planning is pretty much the same. First, you work to understand the species of deal you are trying to catch — research and development, systems development, production, engineering services, information technology services, etc. You classify this opportunity to understand its general characteristics and develop a strategy tuned to those characteristics (a solid R&D strategy just won't work for an engineering services job).

You take a hard look at environmental factors — right now if it isn't ordnance or if it does not deliver ordnance or support delivering ordnance on targets for DoD, the acquisition could slip. You know your target. I know what largemouth bass will be doing every season, what their preferred food is in each season, and what they are likely to bite on. Customers on big deals are a lot like those fish — you need to know what they like and what they do not like, and when those preferences apply. Figure that out and you will do a whole lot more catchin' than just fishin'.

Presentation

Once I have the identified my target fish and probable locations for success, I begin concentrating on how I am going to present my selection of artificial baits under the environmental conditions to get the fish to bite. I have to define the “pattern” or “patterns” that will lead to success. This can vary from day to day in the same locations. It can vary during the same day in the same locations. This requires focus, discipline, confidence, and a willingness to make subtle adjustments to my baseline strategy as the day progresses or as the fish change their behavior. Sometimes these adjustments can be as simple as using a slightly smaller version of my current lure. For whatever reason that day, the bass might want smaller bait. I let them tell me what they want and quickly abandon a presentation that is simply not producing. I work quickly and deliberately to validate what is going to work under the current fishing conditions. Once I find the pattern, I stick with it and I always follow the number one rule of landing the big ones — “never leave fish to find fish.”

I apply the same process when landing big deals. First, I develop my high level strategy as an integral part of my advanced planning process. Next, I begin to reduce that strategy to specifics, the lures I am going to use to get the customer to bite on my offer. I offer strategies I believe will generate interest under that customer’s specific conditions. I give the customer something to react to and let the customer tell me what they want. I stay focused on my strategy; I use discipline to keep things moving (knowing that I am working against time and budget constraints); I keep my confidence that what I am doing is right and do not spend a lot of time second guessing my decisions; and I maintain a willingness to rapidly adjust my strategy to meet customer needs and wants.

Once I find the pattern, I stick with it and I always follow the number one rule of landing the big ones — “never leave fish to find fish.”

I never stick to a losing strategy because I cannot or do not want to change and make adjustments. My goal is to present a solution that offers the most benefits at an attractive price. When I do this well, I land the big ones consistently. And I always follow the number one rule of landing big deals — “never leave a good one I can win to pursue a bigger one with a lower probability of a win.” A “Tournament Day” of five three-pound fish with a total weight of 15 pounds earns more money than a one six-pound fish. Make sure you know what the big ones really are, and what your chances are of catching them!

The Fisherman’s Simple Wisdom

Sometimes we forget that many of our hobbies and activities have a direct relationship to our professional activities. The skills and capabilities we develop pursuing the things we like and that give us recreation often help us sharpen the skills we need to successfully win new business. In my case "Reeling in the Big Ones" uses exactly the same skills whether that big one is a fish or a $500M proposal. Knowledge of what you're pursuing, planning, disciplined execution, and a willingness to adapt to meet changing circumstances is almost always a winning combination in fishing. It's the same winning combination I use to reel in the big deals.

The simple formula of *Fish + Location + Presentation = Success* has a new business analogue we shouldn't forget. *Customer knowledge + Solution + Presentation = Success*. Whether your lure is a Texas-rigged, june bug lizard or a life cycle solution that gives a customer what they need for a lot less money and risk than they anticipated, you have to put it in front of your quarry at the right time under the right conditions to be successful.

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