CEO/COO Corner

This year's Annual APMP Conference clearly demonstrated growth and a shift in membership that reflect a continually evolving profession. We had 427 attendees, 108 of whom were new members to APMP. Our speakers introduced us to new concepts, such as PXML and Customer Message Management, and we learned that a little bit of humor in the workplace can go a long way towards making our difficult jobs more tolerable and maybe even enjoyable. "Proposal Idol" was an overwhelming favorite, proving that even such mundane topics as proposal best practices can be presented in interactive, fun ways.

We also launched our new job and salary survey at the conference. To date, we have nearly 250 respondents, assuring that the survey and its related data will bring great value to our members. Interesting statistics include the following:

- 50% of respondents report into a business development function
- 32% of respondents work for companies with annual revenues exceeding $2 billion
- 48% of respondents hold the title of proposal manager

Responses overall reflect broad expertise, indicating that our members are adept at business development responsibilities from opportunity assessment to contract negotiations. Another interesting trend is that compared to our last survey many of the proposal positions described cover more than one job function, indicating that we continue to be pressured to do more with fewer resources.

The challenges inherent to our business today suggest an opportunity to position our roles in our organizations as knowledge management and business development experts with a view into market positioning, competitive intelligence, and other areas representing key business success factors.

While we viewed our 2004 Annual Conference as a great success, we realize that there are many opportunities to improve. There will continue to be a focus on increasing the value our organization brings to each of you, through local chapters and next year's conference. Your feedback, suggestions, and involvement are more important than ever as our organization continues to evolve from proposal process to business development process.

We invite the APMP membership to let us know your thoughts regarding the 2004 conference. What would you like to see and/or hear next year? Would you value various levels of classes, catering to the beginner up to the advanced level of campaign development? What can be offered to include more of the working staff in your campaign development processes?

You will find e-mail addresses for each of the board members on the APMP web site and we really encourage you to send your ideas, thoughts, and comments to the board. Remember, this is your organization and it is through you that APMP exists and continues to provide cutting-edge campaign development technology.

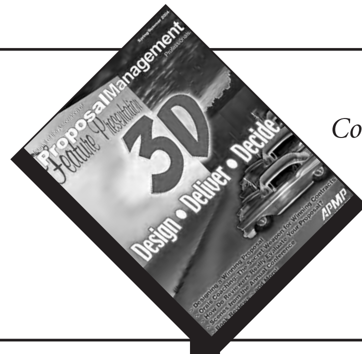
We would also like to remind APMP members about the open board positions starting in 2005. Stay tuned as these positions will be posted on the website in the near future. As always we are looking for interested individuals with a desire to help influence future trends and development of our organization in addition to the arts and sciences of business development. There are wonderful benefits in being a board member and the opportunity is very rewarding!

We thank you for your continued support of APMP and look forward to seeing you next year at the annual conference.

See you in Arizona!

–Mary Mills & Kelli Stephenson

Proposal Management



Cover Art by Colleen Jolly

The Journal of the Association of Proposal Management Professionals

IN THIS ISSUE

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ProposalManagement • *The Journal of the Association of Proposal Management Professionals*

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CHANGES OF ADDRESS AND CORRESPONDENCE:

Members of APMP should send notification of change of address via e-mail to b.n.fields@worldnet.att.net or by mail to: APMP; 300 Smelter Ave. NE #1; PMB 383; Great Falls, MT, 59404.

Any change in correspondence relating to non-member subscriptions should be sent to the same address. Subscription for APMP members is included in the annual membership dues. For non-members, a subscription is $40 per year. Individual issues may be purchased for $20 each from the APMP office while supplies last.

 Claims for missing copies must be made within three months of publication date. Missing copies will be supplied as reserve stock permits.

ADVERTISING RATES AND GUIDELINES:

Rates effective through December 31, 2004.

Rates per Issue:

Premium Placement Locations*
Back Cover: $1800.00 (4 Color) *(Sold for 2004 editions)*
Inside Front Cover: $1500.00 (4 Color) *(Sold for 2004 editions)*
Inside Back Cover: $1500.00 (4 Color) *(Sold for 2004 editions)*
All Other Placement Locations*
Full Page: $1400.00 (4 Color)
Full Page: $1200.00 (B&W)
Half Page: $800.00 (B&W)
*15% discount for all contracts of three or more consecutive issues. Payment in advance required. Rates are subject to change after December 31, 2004.

Schedule:

- Ad commitment (50% minimum, deposit required)—due April 21st (for Spring), or October 15th (for Fall).
- Electronic copy—Due May 14th (for Spring), or November 12th (for Fall).
- Final payment due to APMP—May 14th (for Spring), or November 12th (for Fall).

To Secure Advertising Space:

Please contact John Elder at (703) 841-7801 or e-mail: jelder@caci.com.

Advertising Format and Guidelines:

Submit all artwork electronically as CMYK or Grayscale 300dpi .tiff, .pdf, .eps, .ai, or .psd files on CD-ROM including all necessary fonts. Full bleeds for both color and B&W are necessary. For technical assistance please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

Please visit the APMP Home Page at www.apmp.org for additional information about *Proposal Management*, including PDF archive editions.

MEMBERSHIP:

APMP's mission is to advance the arts, sciences, and technology of business development acquisition and to promote the professionalism of those engaged in those pursuits through the sharing of non-proprietary proposal methods, approaches, and processes. APMP conducts meetings and events, both on a national/international scale and at the local level through individual chapters.

Our annual membership fee is $95. APMP's Federal Tax I.D. Number is 87-0469987. You may obtain a membership form in Adobe Acrobat/PDF format from the APMP wesbite, www.apmp.org. Send your completed membership form to: APMP, Attn: Membership Applications, P.O. Box 668, Dana Point, CA 92629-0668. (949) 493-9398, (949) 240-4844 facsimile.

Invitation to Writers

Now you can share your expertise and experience in a worldwide forum of business development acquisition and proposal management colleagues and peers. Gain visibility. Demonstrate your successes. State your opinions or air your complaints. Send us a letter, submit an article, or propose your topic of interest. Submit a short (50-word) proposal for your article summarizing its principal thesis, issues, basis, and scope. You do not need to be an APMP member to contribute.

Typical Schedule	*Spring/Summer Issue*	*Fall/Winter Issue*
Concept Approval	Late October	Late April
Summary & Outline Due	Mid-November	Mid-May
Article First Draft Due	Late December	Late June
Article Final Draft Due	Late January	Late July
Peer Review & Updates	Late March	Late September
Print & Distribute	June	December

Contribute to our next issue. Let us hear from you today. We are open to many and varied topics of interest to professionals in our field. FOR MORE INFORMATION or to plan your contribution, call or e-mail us.

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If you consider submitting an article, begin by reading the Editorial Statement and Guidelines for Authors at the back of this issue. There you will find our general guidance on manuscript preparation, scope of content, style, and methodology for submission and review.

Welcome From the Editor

With this issue of the *Journal* a new chapter has begun. It seems fitting that we should acknowledge the efforts of those who helped us reach this point, while looking ahead to where we want to go.

I would like to thank Dennis Green for his leadership as Managing Editor since the inception of the *Journal* five years ago. During his tenure, Dennis successfully created a publication that has advanced APMP's mission. His vision directed the *Journal* from a concept to what it is today. Best wishes to Dennis in his future endeavors.

However, that does not mean that we don't enjoy a great deal of continuity. Assistant Managing Editor and Editorial Advisory Board Chair Jayme Sokolow continues to serve with distinction in that capacity as he has from the beginning. Additionally, other unsung heroes, Senior Editor Linda Mitchell, Articles Editor Rick Rider, and Editorial Advisory Board Members Rich Freeman, Phil Egert, Diana Love, and Nancy Cottle also remain driving forces as they have from Day One. Colleen Jolly at 24 Hour Company uses her creative expertise to ensure that the *Journal* has a professional, yet interesting appearance. Frequent contributors Linda Greenwell and Joanna Purvis are also on board and, as always, Executive Director David Winton remains a rock with his moral and (most important) financial support. Many thanks to everyone! As we all may have written from time to time, the integration has been seamless!

Additionally, we have two new members of the *Journal* staff: Lori Granger and Ali Paskun. Lori joins as Assistant Editor, while Ali has taken the role of Books Editor. They have been active APMP members behind the scenes for quite a while and have recently decided to take on more visible roles within our organization. Their knowledge, experience, and creativity will be assets to everyone.

This issue of the *Journal* presents each member of the APMP community an opportunity and a challenge to help determine the future of our publication. Please consider participating as an author, editor, or reviewer. Contact me to become involved!

John

The road ahead for the Journal *is limitless and filled with possibilities. Join today!*

2005 Annual Conference
Call for Presentations

The 2005 Annual Conference is adding a new element – one critical to success of our mission and to winning – Balance. The location for the conference sets the stage for:

Winning and Living ... Achieving the Balance

When: June 7 through 10, 2005
Where: Sheraton Wild Horse Pass, Phoenix, Arizona

Deadlines

Topic selection (title) and 75-word summary	October 15, 2004
Notification of selection of presenters	November 12, 2004
Abstracts/bios for conference brochures	December 10, 2004
Completed electronic versions (ready for CD pressing)	April 15, 2005

Topics for Presentations

- Identifying the right proposal team
- Identifying the right project team
- Using virtual bid teams
- Recruiting/retaining qualified resources
- Time management
- Keeping the team together
- Stress management
- Benchmarking performance (BD-CMM, ISO certification, etc.)
- Identifying opportunities, markets, and clients
- Analyzing opportunities
- Preparing and executing the capture plan
- Preparing the proposal
- Preparing for post-proposal activities

These are just a few suggestions for topics. All topics will be considered. We are interested in presentations that would be attractive to the novice, intermediate, and advanced proposal professional. As in past conferences, we encourage presentations for those involved in government, commercial, and international procurements.

If you wish to submit a topic for consideration, please fill out the online response form on APMP's Website – www.apmp.org.

Located in the Sonoran Desert, it offers a quiet serenity created by Native American tribes who found haven here. The ancient vistas, mountains, and roaming wild horses remain untouched. Designed to be an authentic representation of the Gila River Indian heritage and culture, the resort offers a recreational, educational, and inspirational experience. The architecture, design, art, and legends of the Akimel O'otham and Pee Posh tribes are celebrated in every detail imaginable, indoors and out.

History

The Akimel O'otham Indians trace their roots to the Hu Hu Kam (Hohokam) who farmed the Gila River Valley from 300 B.C. to 1450 A.D. The Hohokam developed an extensive irrigation system of canals, still used today, which gave birth to farming in the desert. The Akimel O'otham and Pee Posh, sometimes called the Pima and Maricopa tribes respectively, were hospitable and friendly, welcoming settlers and transforming a hostile territory into a temporary sanctuary – just as they continue to do now with the Wild Horse Pass Resort.

Resort Features

- A 2.5-mile replica of the Gila River meandering through the resort grounds – scenic boat rides shuttle guests to the golf club and casino
- A riverside pool with cascading waterfalls and bridges designed after the ancient Casa Grande Ruins
- Wild horses roaming the surround desert land and visible from the resort
- The Aji Spa, offering massage therapy, a full-service salon for men and women, and a fitness center
- Numerous recreation choices including an equestrian center offering trail rides, tennis courts, jogging trails, two 18-hole Troon-managed golf courses, a casino, and a kids' club

Scenes from the 2004 Annual Conference

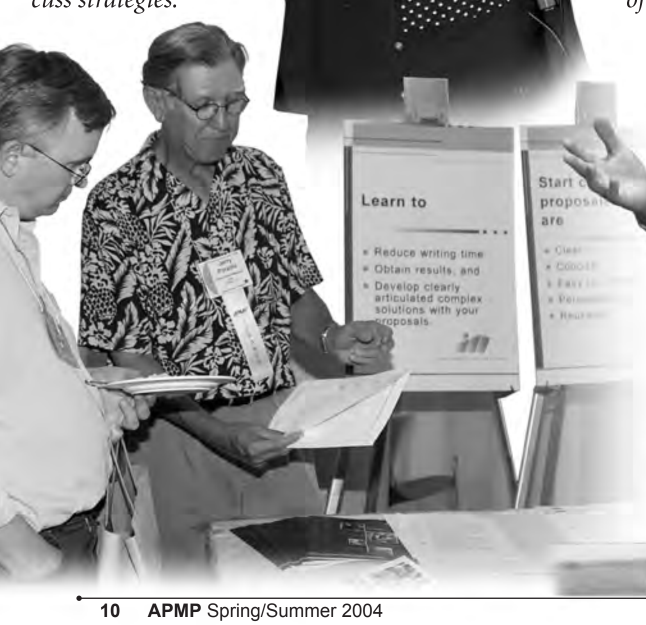
Steve Meyers and Steve Shipley reminisce about APMP's founding.

"So why aren't you taking me seriously?"

"Put your left hand in, put your left hand out..."

Howard Nutt teaches us all that we can fly if we only flap our wings and believe.

Microsoft Word guru Dick Eassom regales Conference-goers with his knowledge of text wrapping.

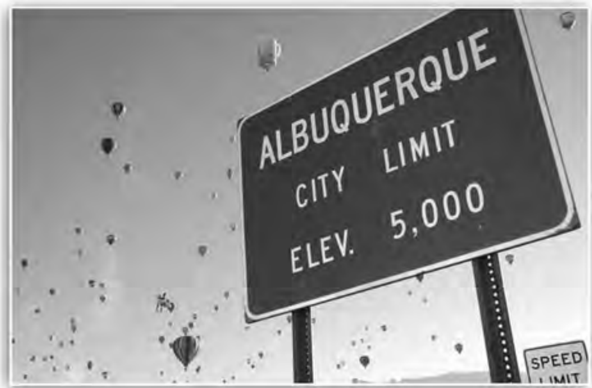


Two Proposal Professionals discuss strategies.

"Hey...has anyone seen my pink flamingo?"

The APMP Fellows Award

The APMP Fellows Award recognizes individuals who have made substantial contibutions to our profession and APMP. Fellows aid APMP as advisers and mentors, continuing their records of excellence and service.



2001 Recipients Presented May 25, 2001
Albuquerque, New Mexico

Nancy Cottle
Marianne Gouveia
Eric Gregory
Steve Myers
Patricia Nunn
Bill Painter
David Pugh
Tom Sant
Steve Shipley

2002 Recipients Presented May 9, 2002
Salt Lake City, Utah

Tom Amrhein
David Bol
Tom Boren
Mike Ianelli
Chuck Keller
Sherrill Necessary
Howard Nutt
Karen Shaw

2003 Recipients Presented May 24, 2003
New Orleans, Louisiana

Charlie Divine
Barry Fields
Dennis Green
Steve Jensen
Jayme Sokolow

2004 Recipients Presented June 2, 2004
Hollywood, Florida

Art Bass
Richard "Dick" Eassom
Michael Humm
Nancy Kessler

Designing a Winning Proposal

By Colleen Jolly

Common sense tells us that a picture is worth a thousand words. The dilemma then becomes choosing the right *picture to represent the* right *words.*

The Importance of Visual Communication

Edward Tufte, the leading expert on informational graphic design and professor at Yale University, explains it this way:

> Often the most effective way to describe, explore, and summarize a set of numbers—even a very large set—is to look at pictures of those numbers. Furthermore, of all methods for analyzing and communicating statistical information, well-designed data graphics are usually the simplest and at the same time the most powerful. (*The Visual Display of Quantitative Information*)

Study after study analyzes the effects that graphics have on the viewer. Informative and communicative design improves comprehension and retention of data and concepts. It links our emotions inextricably to the visual, influencing our rational thought and decision-making processes. "(Emotions) play an essential role in decision making, perception, learning, and more…they influence the very mechanisms of rational thinking." (Oostendorp, Preece and Arnold)

In proposals it is essential to capture your audience's attention immediately and continue to consistently (and professionally) elaborate on the viability and integrity of your solution. Correct application of graphics can dramatically improve first impressions and aid in the comprehension of, or simple introduction to, difficult concepts. As Tufte noted, "Good design brings *absolute attention* to data." (*Visual Explanations: Images and Quantities, Evidence and Narrative*)

We underestimate and underappreciate the importance of visual communication, although we make simple and complicated choices everyday based almost solely on aesthetic quality. We choose clothing, friends, cars, houses, food, and bidders on billion dollar contracts because they speak to a seemingly uncharacterized and inherent sense of visual appeal. As Elsner, a notable scholar in the field of art history, explained:

> Insofar as power is a matter of presentation, its cultural currency in antiquity (and still today) was the creation, manipulation, and display of images. In the propagation of the imperial office, at any rate, art was power. (*Imperial Rome and Christian Triumph: The Art of the Roman Empire AD 100-450*)

Graphics, if done properly, can significantly increase the likelihood that your potential client will agree with you, leading to a decision to purchase your solution rather than that of your competitors. Graphics allow you to clearly articulate the features and benefits of your solution while highlighting key discriminators that may otherwise be lost in a sea of words.

Use graphics to highlight your features, benefits, and discriminators. Don't let your message get lost in a sea of words.

Identifying Requirements and Visual Communications

Your proposal must be compliant. Page, text, and graphic limitations outlined in the traditional government RFP (typically in Sections L and M) are inviolable. "Always follow the formatting guidance provided in Section L of the RFP when preparing your federal proposals." (Frey) Your customer may simply not read extra pages past the established limit or may disqualify your proposal entirely. Pay special attention to the instructions for delivery of the proposal. If an electronic delivery is required develop your proposal in the appropriate version of the specified software. Almost all current versions of software packages are backwards compatible so err on the side of older versions.

Use engaging and compelling stories and examples, particularly in your orals proposal.

Creating a Portable Document Format (PDF)—in the oldest version available—may also solve many compatibility issues between your computer and your customer's computer. PDF was created by the Adobe Company for use with its Adobe Acrobat software. Many programs (all of the Adobe suite of software programs and the Microsoft Office suite) are able to generate PDFs. To view the platform-independent PDFs, download the free reader from www.adobe.com or purchase Adobe Acrobat to access more advanced editing and manipulation tools. PDFs flatten a page or a slide into an almost non-editable image and preserve page breaks, styles, and image quality.

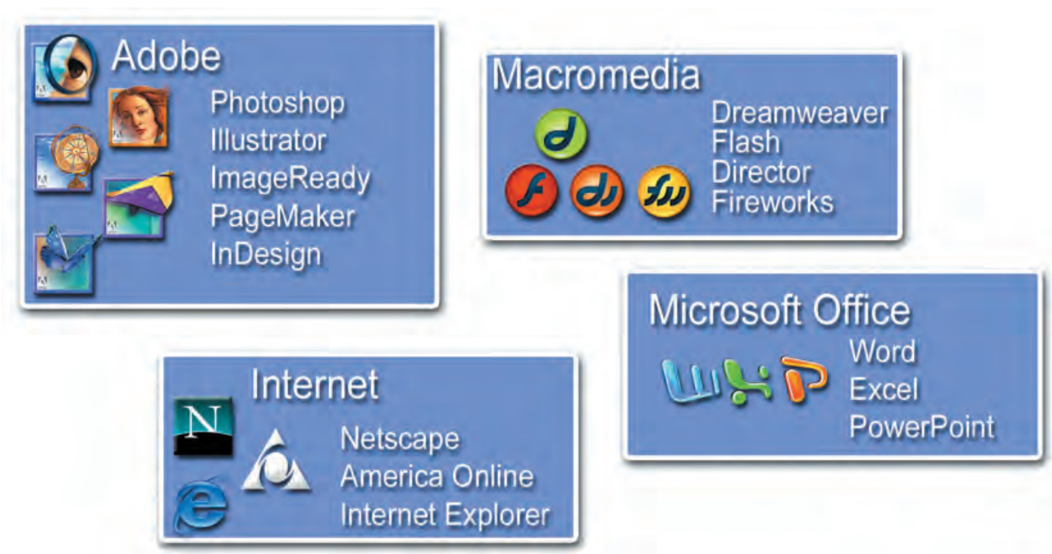
Your proposal must answer every question in the RFP. Focus on your customer's needs and tailor your response to best address the customer's challenges and concerns. Be clear and concise in your oral or written proposal. Avoid passive sentences. Concentrate on action words to sell your idea. Never forget that a proposal is a marketing document: "A presentation is an exercise in persuasion." (Zelazny) Use engaging and compelling stories and examples, particularly in your orals proposal.

You are the expert at what you do – your design/production team should be experts in proposal design and production.

Identifying Resources and Visual Communications

You are the expert at what you do—your design/production team should be experts in proposal design and production. If you need to outsource production, make certain that the design house is well-versed in proposal graphics. Most importantly, they must possess an understanding of and the ability to protect sensitive data, especially if the graphic specialists will not be working at your facility. Your production staff needs to be aware of the demanding proposal schedule (availability after "normal" working hours, weekend support, holidays, etc.). Your resource should have proposal-related samples (sanitized from proprietary data) that show clear, communicative design.

Your resource should be experienced in the most current graphic design and page layout packages including, but not limited to: the Adobe suite (Illustrator, Photoshop, Acrobat, Pagemaker or InDesign), Macromedia Freehand,



Your graphic design resource should be proficient in these standard software packages.

Important equations to keep in mind:

1. **Assume an average of four hours per graphic.** Your proposal will likely have a mix of simple graphics such as an organizational chart intermixed with more complicated graphics. Four hours is a realistic assumption for all graphics (regardless of complexity) and includes time for multiple revisions. A simple chart that initially takes 30 minutes to complete may actually require hours of work due to seemingly simple changes through many iterations.
2. **Assume an average of eight pages per hour for page layout.** The same rules apply in page layout as in graphic creation. Some documents are very straightforward and require little specialty design. Others, particularly those done in more graphically intense page layout programs such as Adobe Pagemaker, Adobe InDesign or Quark XPress, require significantly more production time. Also, multiple iterations or rewrites of entire sections may be necessary to perfect your message.
3. **Assume one graphic per page or slide.** Due to RFP or other restrictions, you may not use one graphic per page or slide or you may have multiple screenshots or process flows in a row for a demonstration briefing with very little text. Remember, particularly in oral presentations, your proposal is a marketing document—you must engage your audience, not bore them. Having a graphic and a few words per slide help the audience concentrate on the presenter and capture their attention.
4. **Assume one page per minute for full-color printing.** Moore's Law states that every 18 months or so technology innovation evolves improving speed, accuracy, and dependability. *However,* sometimes the unexpected happens and a computer malfunctions, your printer needs a part that is hard to find, or there is a power outage in your town. The possibilities for mistakes multiply the shorter the time you have to deal with them, especially when your proposal is at the mercy of a machine. Allow extra time or set aside an entire day to print *and* check every page of your printed proposal—even the highest quality printers hiccup and misprint pages.

Quark Xpress, and the Microsoft Office suite including PowerPoint and Word. There are many design tools that contribute to a comprehensive and aesthetically pleasing presentation, but a resource without the skills and knowledge of the software packages listed above is not suited for proposal work.

A proposal is essentially a marketing document. Many corporations have developed specific branding campaigns, which can include logo, color, and font choices used throughout their marketing materials. Your designers need to be aware of any design stipulations. Also, you need to establish a rapport with your resource and understand its experience and contribution to your team—you will be spending a lot of time with this person or company!

Your style may be influenced by your personal tastes and your preconceptions about your audience, or regulated entirely by your organization.

Scheduling and Visual Communications

When establishing a schedule, keep the four equations at left in mind

These guidelines accurately estimate the time needed for proposal graphic production and will help minimize the unknowns in proposal development. Once you have defined your scheduling needs and timeline (including all necessary milestone reviews) contact all your resources. Good up-front planning manages expectations and identifies potential conflicts to be resolved before you commit to a design resource.

Defining Your Style

Style is the manner in which you express your ideas. Your style may be influenced by your personal tastes and your preconceptions about your audience, or regulated entirely by your organization. "Style is no more than the sum of the characteristics you can perceive about an object, a person, or an experience. But setting a style becomes complex when different types of media, each with its own style, are brought together into a shared environment." (Kristof and Satran) In this case, style refers to assembling the parts of your presentation and graphics into a cohesive and purposeful whole. The parts of your presentation may include but are not limited to:

- Colors
- Fonts
- Logo usage (Do you have subcontractors or teammates? Are you using a team logo for this particular project? Can the customer's seal or logo be used?)

Traditional **Corporate** **Cutting-Edge**

Examples of the many different types of styles appropriate for proposal graphics.

- Background templates
- Bullet characters or images
- Icons specific to your solution or this project (using stars to highlight innovations or consistently using a silhouette of a group of people to represent teamwork)
- Multimedia pieces (such as sound effects, video, or animations)

In any presentation the goal is stylistic unity, not uniformity… your role is to create a harmonious environment in which disparate elements can coexist.

Your style must be consistent throughout your proposal to effectively convey your message. Once you choose your fonts, icons, colors, etc. do not alter them based on personal taste—color inconsistency may confuse your audience and muddle your message. Establish a hierarchy of color early and stick to it. Use colors that are specific to your client or customer.

Some companies may have standard style conventions including corporate colors, templates, and other mandated design specifications. If you have carte blanche over your presentation, you may want your overall style to reflect your corporate colors and fonts to reemphasizes your solution, or you may choose to emulate the style of your customer.

In any presentation "…the goal is stylistic unity, not uniformity … [your] role is to create a harmonious environment in which disparate elements can coexist." (Kristof and Satran) Once you have identified the overall style you want to achieve you must pick the colors, fonts, and icons to further complete your style and establish a standard template to consistently apply the design throughout your presentation.

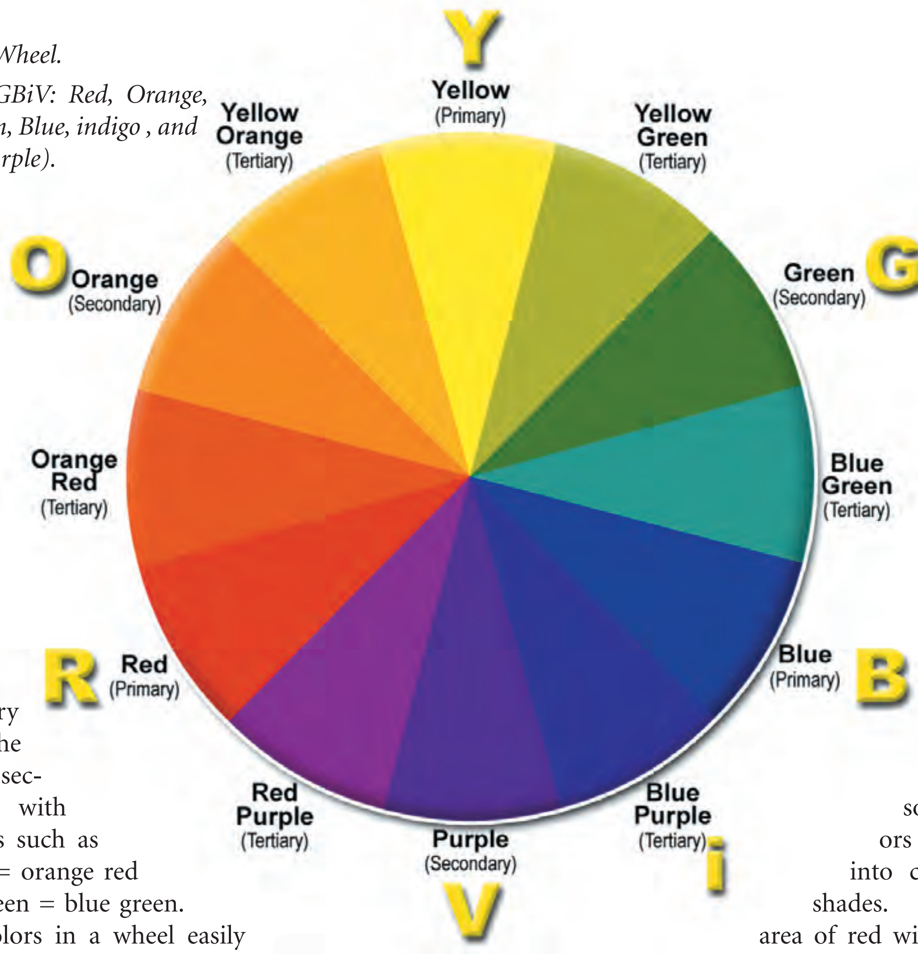
Using Color

Color is an important aspect of developing your overall style and communicating your story or message. Color can subtly influence buying decisions; promote your company and solution through strategic application of corporate colors; and set the mood of your proposal or presentation as urgent, relaxing, or authoritative. Incorrect application of color or using colors that naturally vibrate against each other make your presentation illegible or even distasteful to view and prevent your message from being received and understood. You want to dress your proposal the way you would dress yourself— professionally and in accordance with your audience's expectations. If you wouldn't wear a brightly colored Hawaiian shirt to an important briefing, why would you choose similarly garish colors for your presentation? Understanding basic color theory and the traditional American responses (other countries may have drastically different responses to colors) allows you to present your message and story in a more palatable and professional way.

Basic Color Theory

David A. Lauer and Stephen Patrick's book *Design Basics*, used as a college text at Towson State University in Maryland and other universities throughout the country, is a perfect introduction to design, particularly color theory. Basic color theory involves understanding the placement of colors on a color wheel, which is a circle divided into 12 equal parts showing the interrelation between those colors based on their specific placement on the wheel and the addition or subtraction of white and black from those colors. The visible spectrum of colors includes three main types–primary, secondary, and tertiary. Primary colors are blue, red, and yellow. These colors cannot be mixed or derived from any other colors but can be mixed in various quantities to make every other visible color. Secondary colors—violet (or purple), orange, and green,—are made when each primary color is mixed with each other (blue + red = violet, red + yellow = orange, yellow + blue =

Different colors evoke different emotions and feelings – using colors correctly can help your audience identify with your message or see implicit danger in your competition's solution.



Basic Color Wheel.

Think ROYGBiV: Red, Orange, Yellow, Green, Blue, indigo , and Violet (or purple).

green). Tertiary colors are the blending of secondary colors with primary colors such as orange + red = orange red and blue + green = blue green. Placing the colors in a wheel easily shows the inherent interrelationships between colors (Lauer).

Warm colors are better as highlight and accent colors as they literally pop off a cooler, more subdued background.

Hue, Saturation, Value

Color consists of three variables: hue, saturation, and value. The hue is the placement on the color wheel or spectrum (Lauer). The saturation of a color is its purity, most often perceived as its vibrancy and intensity or its dullness (amount of grey it contains). The value of a color is its relative darkness or lightness. A color made by adding white to another color is called a tint. Similarly, a color made by adding black to another color is called a shade (Lauer).

Choosing Color Wisely

Different colors evoke different emotions and feelings—"…color causes an emotional reaction and relates to the thematic subject matter" (Lauer). Using colors correctly can help your audience identify with your message or see implicit danger in your competition's solution. All colors are subdivided into cool and warm shades. "Touching an area of red will assuredly not burn your hand, but looking at red will indeed induce a feeling of warmth. The effect may be purely psychological, but the results are very real." (Lauer) Blues, violets, and greens are cool colors that can create a refreshing, comforting, and balanced atmosphere. Blue is a widely liked color and is often used in corporate logos and in presentation backgrounds. Warm reds, yellows, and oranges exude empowerment, happiness, and energy but can also mean danger or incorrect processes.

Vivid warm colors are often too intense for presentation backgrounds or large swathes of color, as warm colors appear to advance while cool colors appear to recede (Lauer). Warm colors are better as highlight and accent colors for objects such as take away boxes or other important discriminators as they literally pop off a cooler, more subdued background.

Using too many similar colors may blend important information into the background of your presentation.

Monochromatic, Analogous, and Complementary Colors

Monochromatic colors represent all the values (tints and shades) of a single hue. Grayscale is the most common monochromatic color scheme. Analogous colors are colors that are next to or very near each other on the color wheel such as blue and green or blue and violet. These colors tend to look pleasant together but using too many similar colors may blend important information into the background of your presentation. Use complementary colors, colors that are opposite on the color wheel, such as green and red, yellow and violet, blue and orange, to make aspects of a busy graphic stand out (Lauer). Notice that many of your favorite sports teams make use of these complementary combinations. In a process flow of blue boxes, use orange circles or diamonds to represent key decisions or project-specific discriminators.

Most current desktop printers and software can color match RGB documents although they too are based on a 4-ink process.

On Screen vs. Print (RBG vs. CMYK)

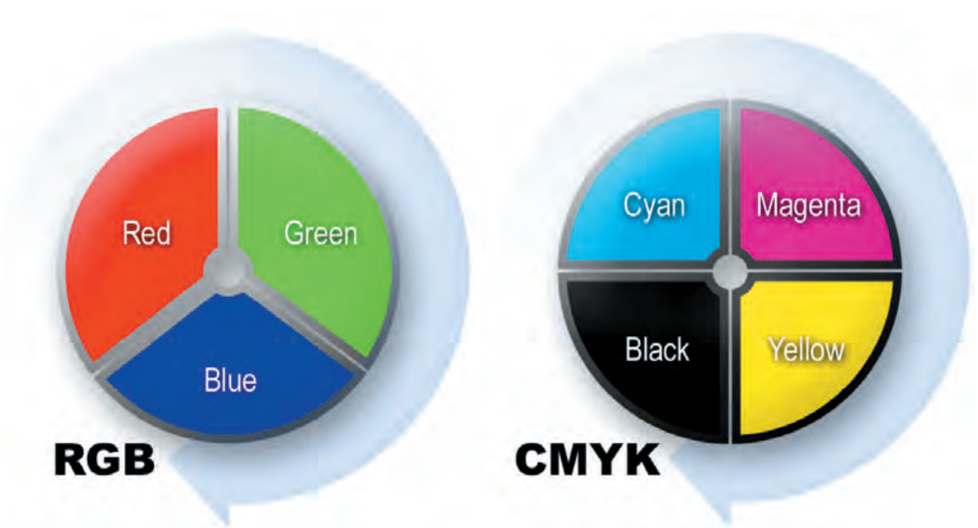
Printed and on-screen graphics may require different color modes to accurately represent specific colors. Color modes in standard software packages include grayscale, RGB, and CMYK. RGB stands for Red, Green, and Blue. These colors are mixed to display the pixel colors on a computer monitor. Combining these three colors in values from 0 to 255 can create every color of emitted light. Setting R, G, and B to zero generates black, while setting all to 255 creates white. RGB colors are more vibrant when displayed on screen than CMYK colors and are the standard color mode for on-screen presentations such as PowerPoint. CMYK stands for Cyan, Magenta, Yellow, and Black. CMYK is the standard color model used in offset printing for full-color documents. Because such printing uses inks of these four basic colors, it is often called 4-color printing. Most current desktop printers and software can color match RGB documents reasonably well, although they too are based on a 4-ink process, which usually requires four separate printer cartridges.

Serifs improve readability as they create lines for the eye to move along more quickly and steadily.

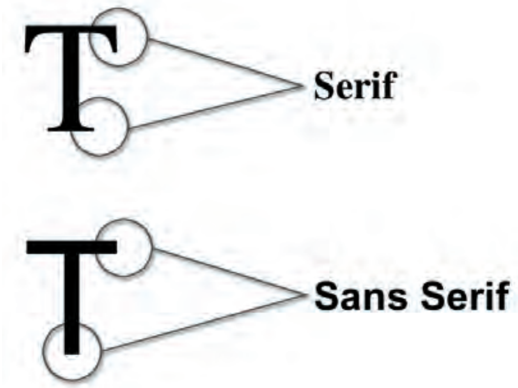
Type and Font Choices

Standard fonts (the fonts originally installed on your computer, including Arial, Times [or Times New Roman], and Courier) are divided into two main categories. Serif fonts like Times have small decorative strokes added to the end of the letter's main strokes. Serifs improve readability, particularly for large quantities of text, as they create lines for the eye to move along more quickly and steadily. Sans Serif fonts like Arial have no additional decoration and appear cleaner and more modern. These fonts are best used for small amounts of large text such as in oral presentations or as headers in written documents.

Choose your font styles early and for specific reasons. For instance, only use bold text in headers or italic text for specific technical terminology or other phrases you would usually put in quotation marks. Create uniquely named styles (such as Your Company Heading One or Your Project Body Text) in Microsoft Word to avoid inconsistency among many documents and many authors. Using styles also allows you to instantly and consistently update large documents. Unless specified in your RFP, changing the leading (the space between lines) and the tracking (the space between letters) may help tighten page-restricted documents. To avoid font substitution in electronic documents, be sure to use a ubiquitous font



Graphic depiction of RGB vs. CMYK color modes.



You can distinguish serif and sans serif fonts by their decorative strokes (or lack thereof).

like Arial, Times, or Courier. If you submit Acrobat PDF files, be sure to embed all fonts and save to the lowest possible or RFP-specified version of Adobe Acrobat.

Iconify your processes into recognizable graphics...use the inherent complexity of imagery to simplify charts or processes.

Iconography

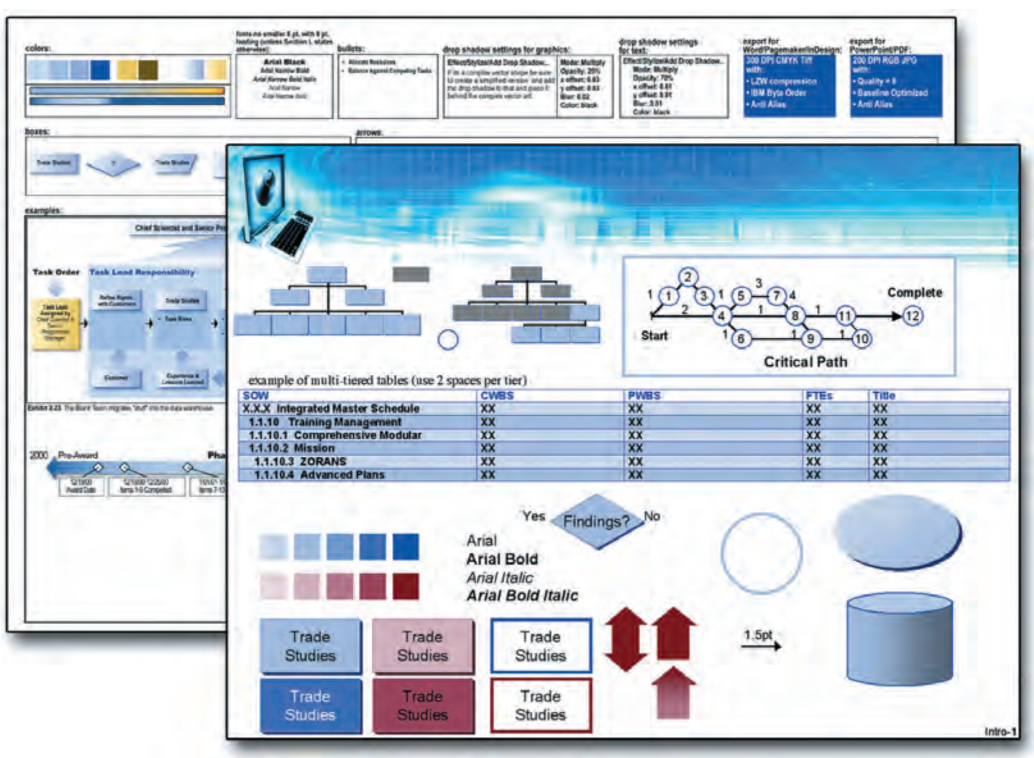
Use simple imagery to represent repeated elements or concepts. Iconify your processes into recognizable graphics such as a literal wall of fire to represent a technical firewall or a handshake to represent partnership, cooperation, or sealing an agreement. "Visuals are important…they have the ability to demonstrate relationships more clearly and more quickly than information in words or tables." (Zelazny) Use the inherent complexity of imagery to simplify complicated charts or processes. Showing the literal relationship between a user's computer, the Internet, the company's firewall, and the office network printer through icons of each step or each important piece of equipment is easier shown than said.

Use the template to keep your proposal consistent throughout many authors, iterations, and intersecting concepts.

As Robert S. Frey said in his book, *Successful Proposal Strategies for Small Businesses: Winning Government, Private Sector, and International Contracts*, "Well-designed graphics can convey complex information in an easily understood format." Create an image library of frequently used icons to improve consistency across multiple processes and make finding those images easier when in a hurry.

Templates

Creating and solidifying template designs before starting any graphics, page layouts, or slides drastically reduces the time spent readjusting and reworking pieces of your proposal in its final stages. Create a template that includes your color palette, fonts, icons, and other repeated



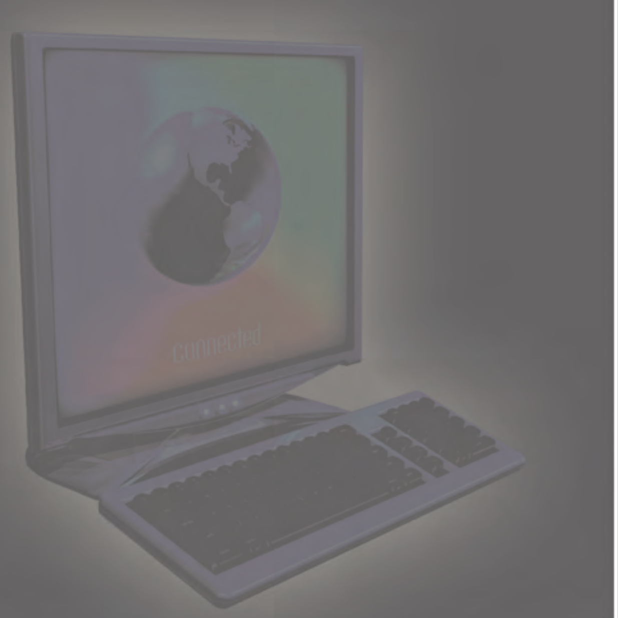
Examples of templates for written and oral proposals. Templates should include example colors, repeated graphic styles (like tables and icons), example fonts, and other specific information unique to the proposal.

Raster images can be saved in a variety of formats for specific uses, for example:

- GIFs (Graphics Interchange Format) are most often used for Websites and simple GIF animations. GIFs are typically indexed color (which is specific for online, fast download design) and have limited capacity for exact color matching. GIFs are not recommended for print use.

- JPGs (Joint Photographic Experts Group) are RGB, or Grayscale color mode, color match well and can be imported into Microsoft Office documents with ease. JPGs have similar mid-range print and onscreen quality as TIFs but tend to be smaller file size. JPGs are best for oral proposals.

- TIFs (Tagged Image File) can be RGB, Grayscale, or CMYK color mode and are the preferred format for professional printers. File size tends to be larger than other formats but is the highest quality. TIFs are best for written proposals.



imagery. It should also include samples of graphics in the style you have chosen, data that will help maintain control and consistency over the development process, such as known taboos (the CEO hates yellow), or technical specifications (all graphics must be 300 dpi). Use the template to keep your proposal consistent throughout many authors, iterations, and intersecting concepts. Randomly changing colors, icons, font formats, slide backgrounds, and other stylistic attributes will dilute focus and confuse your audience. The audience assumes that a change in style connotes a change in meaning.

> *Vector imagery can be easily manipulated but is visually more rudimentary and can be less appealing…rasterized graphics are more visually appealing but are more time consuming to create and manipulate.*

Other Graphic Considerations

Vector vs. Raster

Images can be digitally created in vector and raster. Vector imagery is resolution independent. Vector graphics can be enlarged or shrunk indefinitely as the lines, points, and shapes that make up vector imagery are defined by mathematical formulas. Adobe Illustrator, Macromedia FreeHand, CorelDraw, and AutoCad are software packages that create and modify vector imagery. Vector imagery can be easily manipulated but is visually more rudimentary and can be less appealing, such as clip art. Rasterized imagery is resolution dependent and includes any scanned graphics or text, photographs from a digital camera, images from Website, and most photorealistic images. Rasterized graphics are more visually appealing but are more time-consuming to create and manipulate, may be less communicative if done poorly, and can drastically increase the file size of presentations and documents.

> *The file formats at the left are the most common and standard formats and all can be easily inserted into Microsoft Office documents.*

Vector Imagery

Raster Imagery

The same image concepts in both vector and raster. Notice the images on the left are more rudimentary while the images on the right are more realistic.

Vector images are typically saved in EPS (encapsulated PostScript) or PS (PostScript) file format and can only be opened and edited in the aforementioned programs. They can be opened in a rasterized non-editable version in almost any graphics package but cannot be inserted directly into Microsoft Office. Vector images must be saved in a rasterized format before insertion.

The file formats listed on page 20 are not the only formats available or useable in creating oral or written proposals. These three, however, are the most common and standard formats across platforms and all can be easily inserted into Microsoft Office documents. Other raster file formats include BMP (Bitmap), PNG (Portable Network Graphics), and PICT (Apple graphics format).

Most professional graphics programs can alter both the physical size and resolution… they are not able to drastically enhance the resolution of a file.

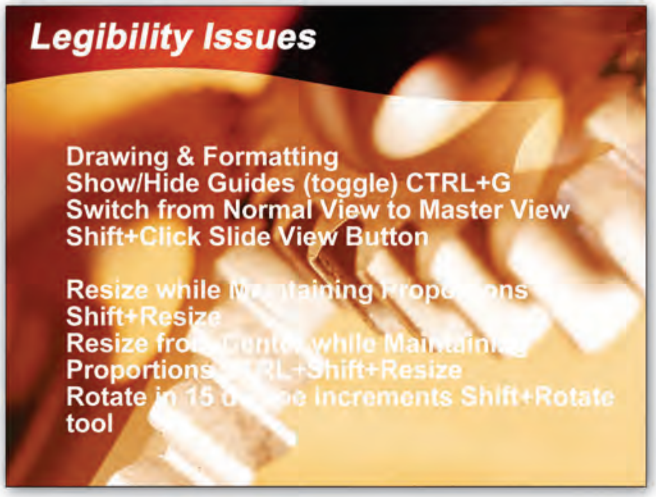
Resolution

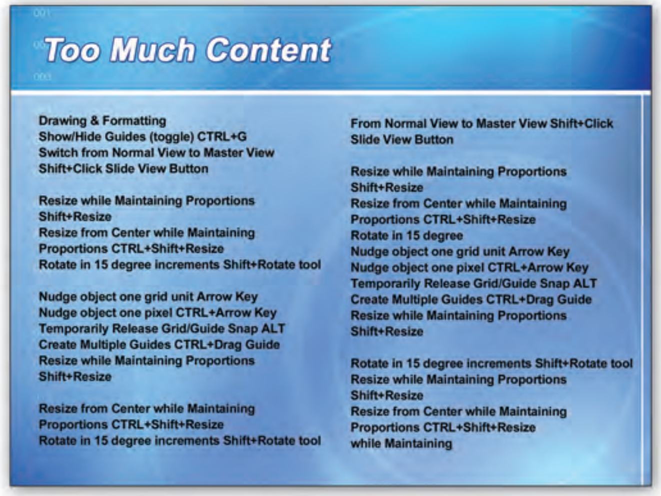
Resolution refers to the number of pixels (in both height and width) that comprise a digital rasterized image. Images made up of more pixels have a higher resolution, greater clarity, higher definition, and larger file size. Resolution is commonly referred to in terms of dots per inch (dpi), which is the number of dots a printer prints in a 1-inch line or on screen (and less commonly) as pixels per inch (ppi). Pixels are square (dots are circular) in shape and are always present—pixels vary in color and level of lightness while dots vary in size, color, and number (Kristof and Satran).

Too often presenters are concerned with providing their audience a complete view of their process, resulting in slides becoming unmanageably complex.

The standard monitor resolution for web users is 72 dpi, 200 dpi for PowerPoint presentations and graphics printed on standard desktop printers, and 300 dpi or larger for images professionally printed on a 4 (or more)-color press. An image taken directly from a Website at 72 dpi may not print with the same clarity when used in a venue other than online (PowerPoint, Word, etc.), particularly if the image is stretched. Physically large images that have small dpi are comparable in overall size to physically small images with a large or average dpi. Most professional graphics programs can easily alter both the physical size and the resolution—they are not able to improve or drastically enhance the resolution of a file but rather modify the image within its particular constraints. For instance, you may need to resave a 22x22 inch 72 dpi image as a 4x4

High and low resolution can dramatically affect the quality of your graphics.





Using a busy background that doesn't sufficiently contrast with the overlaying text or putting too much information on one slide can neagtively affect legibility and acceptance of your proposed solution.

inch 200 dpi image for easier use in a particular instance, or you may try to slightly increase both the physical size and resolution of a very small image to improve its visual presence but not necessarily its legibility.

Too many graphics, a busy background, or one that does not contrast well with overlaying text may compromise the effective communication of your story.

Legibility

Legibility is an extremely important and often neglected aspect of oral proposals and other types of projected presentations. Too often presenters are concerned with providing their audience a complete view of their process or every aspect of their data set, resulting in slides becoming unmanageably complex. Too much text on a single slide will drive the font size lower and decrease the legibility of text when projected. As Zelazny said, "Thou shalt ensure legibility to the person sitting the farthest from the screen."(*Say It With Presentations*)

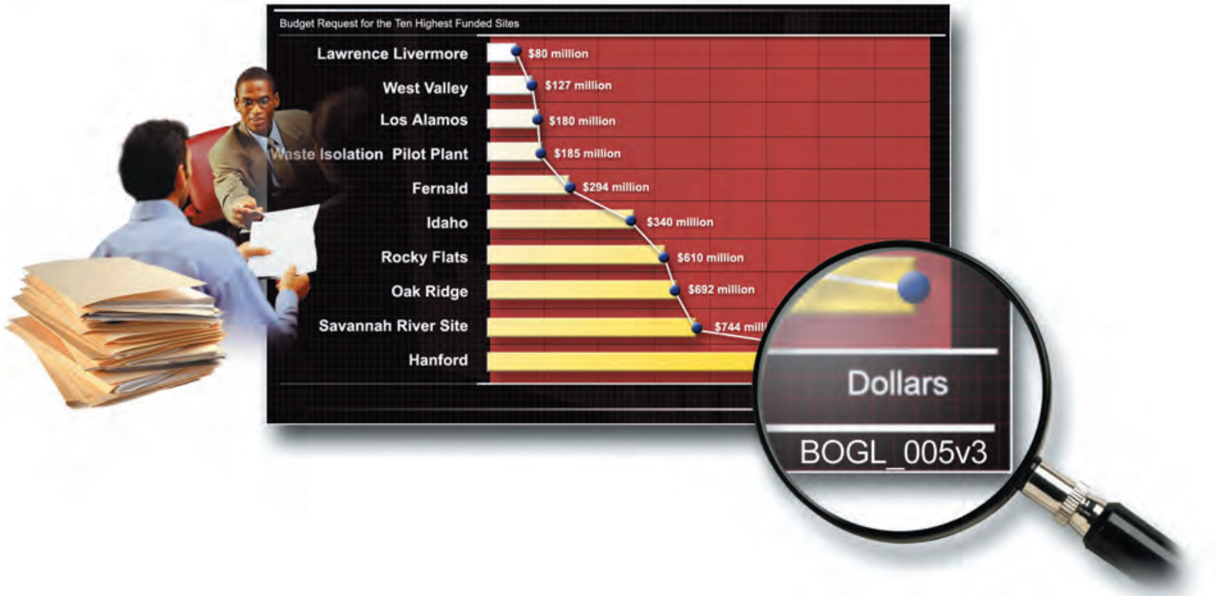
Too many graphics, a busy background, or one that does not contrast well with overlaying text will also inhibit easy reading and may compromise the effective communication of your story. Always test your presentation in an environment closest (if not identical) to the one in which you will present. Visuals on a laptop screen or on a transparency may appear very different when projected.

Logging Graphics

Logging graphics is essential for keeping the proposal production and design process streamlined and drastically improves your ability to find graphics used in previous proposals for your new effort. Set up a graphics log that includes an assigned number: the common name of the bid plus a consecutively assigned number along with a version number (i.e., XYZ_002v2), the name of the graphic originator, the date the graphic was originally generated, the working title and the section number, the page number, and/or the software package the graphic was created in, as applicable.

Adding version numbers to the tracking number identifies a graphic that may have undergone iterations and can serve as a tracking feature for dollars spent, perfecting a given graphic or presentation.

Graphic numbering eliminates the confusion of unstructured naming conventions (chart.jpg, chart with lines.jpg, etc.) and eases problems associated with finding graphics after their creation or addressing questions regarding a specific author's intentions or other problems that may arise,"Adding a file path name in a very small font directly into the graphic file…will also help when these graphics iterate or shift within the document." (Frey) Adding version numbers to the tracking number consistently and accurately identifies a graphic that may have under-



Place a graphics log number in very small type in the corner of all graphics to ensure consistent and accurate graphic tracking. Include version numbers and other unique identifiers to find graphics more easily for the next proposal.

gone iterations and can serve as a tracking feature for dollars spent, perfecting a given graphic or presentation—the more versions iterated the more costly the finished product.

Your message is the most important part of your proposal…formulate your message first; then use graphics to enhance audience understanding.

Your Message or Theme

Your message is the most important part of your proposal and should be boiled down to a simple and concrete headline or takeaway. "It's the answer to the question you were asked to probe. It's the unifying element of your presentation, the *what's so* and the *so what* in one minute." (Zelazny) Complicated graphics, charts, supporting data, and testimonials can dramatically improve and highlight your message or further dilute a weak and poorly structured concept. Formulate your message first; then use graphics to enhance audience understanding.

Frey commented, "These sales messages, or themes, should be developed early in the proposal response cycle so that the entire proposal writing team can incorporate them into their narrative and…graphics." (*Successful Proposal Strategies*) If your message is complicated and not easily captured by simple graphic imagery, include the 'bumper sticker' version of the text in the graphic to facilitate correct understanding. Always ensure that the audience takes away the *right* idea.

Communicative Graphics are Essential

Excellent, consistent design coupled with thoughtful organization of important data and concepts will improve your proposal. Inaccurate, inconsistent, and visually unappealing graphics will damage the enthusiasm and comprehension of your solution, message, or narrative and may cost you access to valuable opportunities. Frey noted, "It is essential not to submit a boring, lackluster proposal to any potential client organization."

The right graphics will enhance the right words, but do not substitute the right words for illogical or unnecessary graphical fluff.

Standardize processes for assessing proposal depth and breadth, resource accessibility and fit, and retention of stylistic professionalism. Tufte believed "A silly theory means a silly graphic." (*The Visual Display of Quantitative Information*) The right graphics will enhance the right words but do not substitute the right words for illogical or unnecessary graphical fluff. Carefully examine your RFP, your potential client, your perceived audience, the format for your proposal, available funds and resources, personal likes and dislikes, schedule, and message before even thinking about complicated graphics and multi-layered animations. Prepare your message and your preconceptions before involving design resources.

Create graphics that accurately represent your organization and project in the most comprehensive, precise, and communicative way possible. Highlight your message whenever possible.

Graphic excellence is the well-designed presentation of interesting data—a matter of *substance*, of *statistics*, and of *design*. Graphic excellence consists of complex ideas communicated with clarity, precision, and efficiency…and graphical excellence requires telling the truth about the data. (Tufte, *The Visual Display of Quantitative Information*)

Your goal is to create a document or presentation that accurately represents your organization and your ability to perform the prescribed task(s) in the most comprehensive, precise, and communicative way possible, by combining the most sensible and stimulating concepts with the most appealing visual representations. Be professional, accessible, truthful, and beautiful, and your solution will sell itself.

Be professional, accessible, truthful, and beautiful, and your solution will sell itself.

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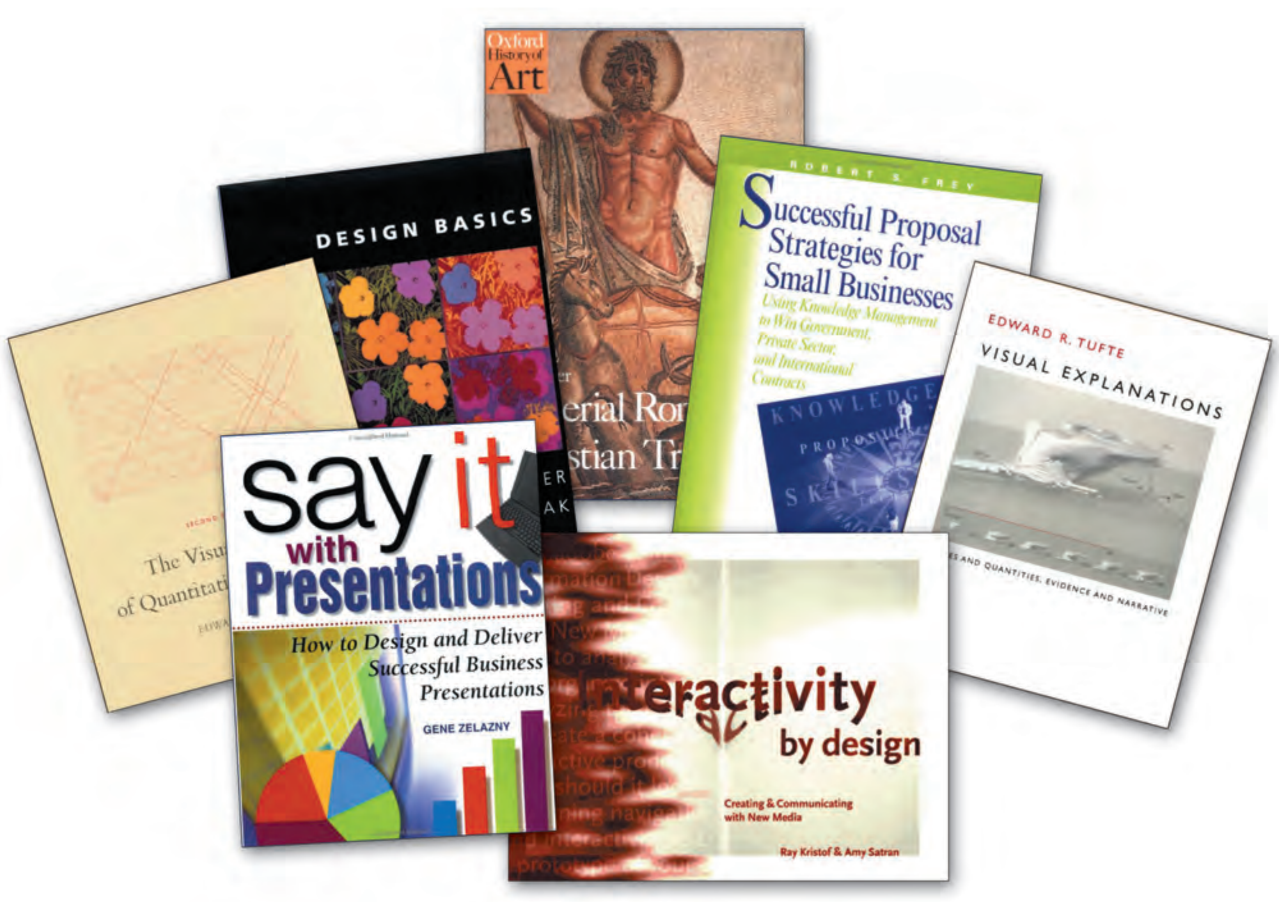

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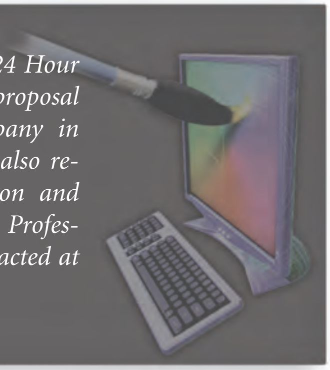


Orals Coaching: The Secret Weapon for Winning Contracts

By John Parker Stewart and Daniel Stewart

The fight to win and keep government contracts is an intense and unforgiving business. In the current and future marketplace, competition for contracts will only increase, especially as government funding rises. Because of the war on terror and the effort to recapitalize the armed forces, government funding will grow. In fact, it is estimated that those seeking Department of Defense contracts will collectively increase their Bid & Proposal budgets by more than 600 million over the next five years.[1]

To effectively compete, contractors must use every resource they can find to successfully win contracts. Currently, the government is strongly emphasizing a less traditional method in the proposal process: an orals presentation. Preparing for the orals presentation is a must for a successful capture. Orals coaching has, therefore, become a secret weapon to win and keep contracts.

This article describes the increase in orals requirements in government contracting, how contracts are officially and unofficially won, what orals coaching offers, how to hire the right orals coach, the content and instruction that should be offered by an orals coach, the orals coaching process, a case study of a successful orals coaching experience, and a call for action.

A General Services Administration executive recently estimated that over 70 percent of solicitations for programs valued at $10 million or more will have orals requirements, with the orals counting an average of 40 percent of the evaluation.

A New Type of Proposal

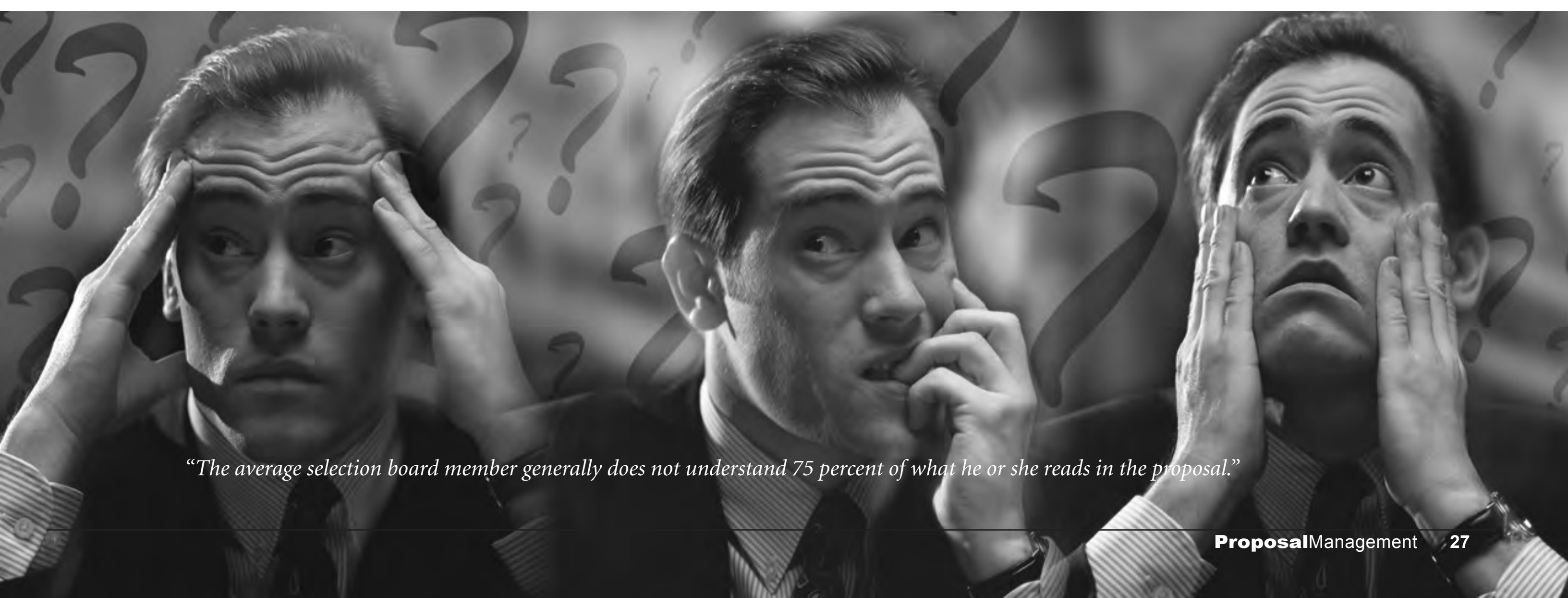
Typically, a Request for Proposal (RFP) is announced and a large, comprehensive, written proposal is prepared by those seeking the contract. However, sole reliance on a single written proposal is growing out of style. This is partially because written proposals involve a long and costly process for both government and industry.

Also, reliable studies have shown that, due to the complexity of today's proposals, the average selection board member generally does not understand 75 percent of what he or she reads in the proposal.[2] Because of the challenges associated with written proposals, government agencies are placing more emphasis on nontraditional methods for awarding contracts.

While a comprehensive, written proposal is still often expected, an additional method – the orals presentation – is quickly becoming a standard feature of the evaluation process. In fact, a General Services Administration executive recently estimated that over 70 percent of solicitations for programs valued at $10 million or more will have orals requirements, with the orals counting an average of 40 percent of the evaluation.[3] In addition, orals proposals are in line with the revised methods advocated in the new Federal Acquisition Regulation Part 15 guidelines.[4]

The following statement from the Department of Energy Website confirms the shift to orals proposals: "Procurement and program staff who have tried this [orals] approach have found it to be an exciting and effective way of doing business and have become advocates for the use of oral presentation techniques. For instance, the Internal Revenue Service has identified a second, high dollar value requirement for information technology services that will rely on oral presentations. The Nuclear Regulatory Commission is moving forward to incorporate oral presentations in many of its routine requirements. The Department of Energy has targeted four solicitations, including a multi-billion dollar management and operating requirement and a requirement using two-step sealed bidding, as candidates for oral presentation components. These pioneering efforts can only further reinforce the viability of oral presentations."[5]

In contrast to written proposals, oral proposals more effectively convey the contractor's technical approach, management experience, and past performance. Orals reduce procurement lead time and administrative costs for both government and industry. Most important, orals help the selection board visualize a relationship with the potential contractor, providing a clearer picture of the contractor's adaptability, competence, and responsiveness. The source selection board is able to evaluate the key members of the potential contractor and gain deeper insights into the proposed technical and management approach. Orals address the factors that really win contracts.



"The average selection board member generally does not understand 75 percent of what he or she reads in the proposal."

How Contracts are Really Won

Every RFP has a set of standard guidelines that establish the criteria for choosing the vendor. These guidelines usually focus on the vendor's past experience with similar projects, technical approach and cost, and management experience. Most written and oral aspects of a proposal emphasize these three areas. While these are essential components for creating a successful capture, they tell only half the story. The actual criteria that win contracts are usually far less objective, and center around the communication and people skills of the presentation team. The unofficial reasons why contracts are awarded are:

- Open communication between the source selection evaluators and the orals team during the presentation
- The cohesiveness and competence of the orals team
- The customer's ability to understand the proposal
- A professional and concise presentation with clearly designed and presented charts
- Properly highlighted discriminators
- The ability to speak persuasively

Unfortunately, many of these key behaviors do not come naturally to a highly focused team of technical experts. It takes dedicated coaching to help engineers and scientists become adept at building relationships of trust, speaking with persuasion and passion, and designing a presentation that connects with the selection board.

Dedicated coaching and practice help engineers and scientists develop key behaviors reviewers unofficially praise.

Orals Coaching Matters

The bottom line for business development is that the orals coaching matters and will probably determine the outcome of the entire contract. In response to the importance of the orals proposal, organizations have begun to invest in orals coaching to effectively prepare the orals team.

Organizations realize that the orals team represents the company and can project a positive or negative image based on its perceived cohesiveness and competency. Contractors who want to win contracts therefore engage an experienced orals coach. As a general rule, we have found that teams who have an orals coach win more contracts than teams without such guidance.

Today, more organizations hire external orals coaches.

How Do You Select an Orals Coach?

When it comes to selecting an orals coach, the choice is between an internal or external coach. An internal coach is less expensive and, if properly trained in presentation skills, can do a good job of coaching individuals to improve their public speaking skills. Internal coaches often know the culture and the significance of the contract to the organization; they may be more committed to the project. The downside is that internal coaches often lack specific training experience, usually have not had in-depth exposure to the proposal process and lack objectivity. They are often too close to the project to offer objective recommendations on highlighting discriminators or crafting visuals that really connect with the customer.

Although significantly more expensive, external coaches can usually provide extensive amounts of expertise and experience. Many external coaches have proven track records or teaching presentation skills and have a variety of satisfied clients. External coaches may have consulting experience in teambuilding or leadership development that can help build a strong presentation group. Because of their exposure to the orals process from multiple clients, they have an industry-wide perspective. They know how to direct the intense orals coaching processes of selecting team members, developing individual presentation skills, creating a cohesive team, highlighting discriminators, and continually practicing until the presentation is flawless. In addition to their presentation coaching skills, orals coaches with a background in teambuilding bring a highly valued skill set in developing an effective orals team.

It all comes down to the type of contract you seek to win, the likelihood of your winning it, and how important the contract is to your organization. When a contract is small and peripheral to the organization's strategic focus, using an internal coach is a logical choice. When a contract is large and highly significant to the organization, external coaches are typically engaged. We have found that when an organization wants to win, it usually goes for experience by hiring an external orals coach.

No matter what type of orals coach is hired, the coach should have the experience and capacity needed to: (1) deliver the needed content and instruction and (2) understand and use a tailored coaching process.

The Needed Content and Instruction

An orals coach should have a tool box of knowledge, skills, and abilities to coach the orals team. Each orals coach may have certain specialties and interests. A coach should be selected because of his/her match with the requirements of the specific orals team and proposal requirements. The following list describes the significant areas of expertise that an orals coach can use to effectively train an orals team.

1. Speaking and Presentation Skills
2. Speech Writing and Script Preparation
3. Content Development and Organization
4. Group Practice Coaching
5. Customer Profiling and Analysis
6. Preparation of Charts and Graphics
7. Leadership Development
8. One-On-One Coaching
9. Video Taping and Analysis
10. Question and Answer Preparation
11. Credibility and Presence Development
12. Rapport Building Skills
13. Team Cohesion

The Orals Coaching Process

An orals coach needs to use a process that guides the coaching. Using a process prevents mistakes and ensures important aspects are not overlooked. Having a process also suggests that the orals coach knows what he/she is doing and knows what it takes to make a winning orals team. An orals coach should consider organizational expectations and the specific needs of the orals team when crafting an orals coaching process. The usual orals coaching timeframe is 4-6 weeks of full-time effort. A typical orals coaching process includes:

1. Quick study of the situation (RFP, customer needs, history of contract, any special circumstances)
2. Assessment of individual and team capability
3. Development of presenters into a cohesive team
4. Video taping each presenter to determine initial strengths and weaknesses
5. Identification and emphasis of key discriminators
6. Designing a coaching plan and schedule
7. Monitoring the design of all charts and visuals
8. Coaching for presentation at pink team
9. Conducting extensive team and one-on-one coaching with video feedback
10. Preparing for red team
11. Polishing presentations using video feedback
12. Finalizing plans for delivery to the source selection board

Design (and keep!) a strict coaching schedule.

A Successful Orals Coaching Experience

The following real life example illustrates the orals coaching process and the variety of skills needed by an orals coach. This is a personal orals coaching experience from one of this article's co-authors, John Parker Stewart. Because the narrative is told in the first person, it provides clear insight into the expectations one can have when working with an orals coach.

The client valued the external and objective perspective I brought, since its in-depth knowledge of the project sometimes hindered a big-picture view.

John relates:

"I received a call from an East Coast client who was very concerned about the orals phase of a lucrative contract that was a 'must-win' in their business plan. It was highly classified work with the Department of Defense.

"I arrived and immediately went into data gathering mode by interviewing all the key players. This gave me the history of the contractor in this arena, an overview of the RFP, the client's capabilities, and its view of the competition.

"The next step was assessing each member of the proposal team, their background, presentation skills level, and the degree of his/her collective cohesion. From that assessment, I worked with the proposed program manager and selected the principal members of the orals team by interviewing and observation. When this group of seven (plus two alternates) was finalized, I spent three days molding them into a unified team by letting them experience real, measurable synergy through several team exercises. Over the course of those several days, the team jelled and each member began to support the other members as they learned each other's strengths and weaknesses. Obtaining this level of understanding and cohesion is the first essential plateau of creating a successful orals team.

Highlight essential discriminators...emphasize [them] graphically and orally.

"The coaching process continued as I placed each team member in front of the camera. I use extensive video feedback, so it is helpful to get each person comfortable with the technique early on. This initial video taping session not only gives each person greater self-awareness and helps them overcome initial speaking anxiety, it also helps them feel at ease with me as their coach.

"While the team building and camera work was happening, I concurrently worked with key members of the

Use video feedback to make presenters comfortable with initial speaking anxiety and provide a greater sense of self-awareness.

proposal writing team to determine and highlight essential discriminators that we could emphasize graphically and orally. The client valued the external and objective perspective I brought, since its in-depth knowledge of the project sometimes hindered a big-picture view.

We even had a wardrobe check…some team members had never owned a suit or tie.

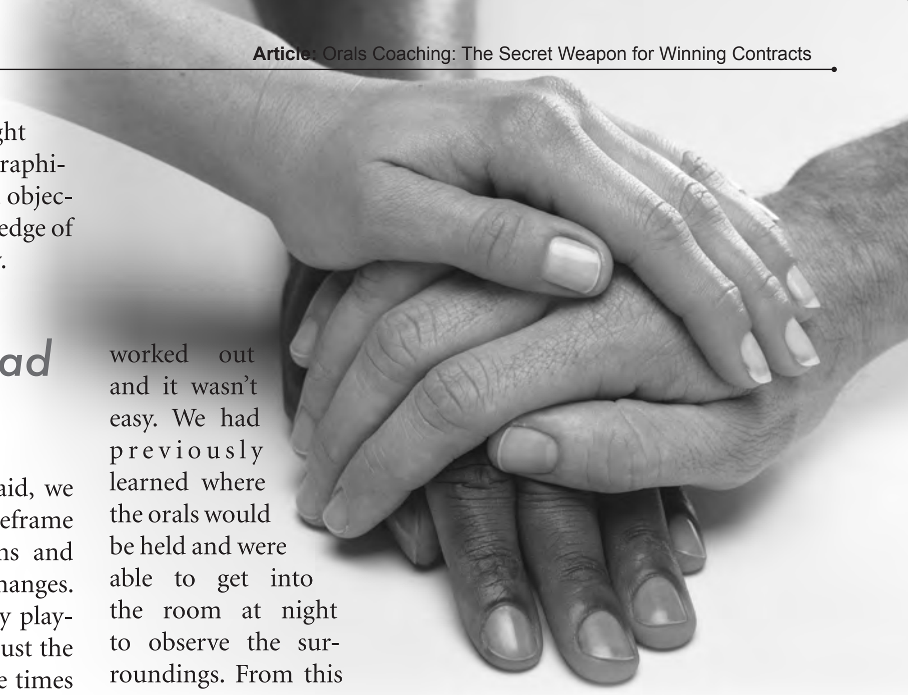
"Once all of this needed groundwork was laid, we developed a schedule. The orals preparation timeframe identified the dates for the pink and red teams and included the flexibility to cater to customer changes. Because most of the orals members were also key players in the proposal team, we had to frequently adjust the scheduled times for the oral preparations, and the times allotted, to design the charts for the final drafts of the written pricing and tech volumes. I was also concerned about maintaining the health of each team member, allowing for adequate sleep and a decent diet whenever possible. Much like any orals coaching experience, this stage ended up being a day/night marathon bordering on exhaustion.

"As the heavy pace continued, we intensified the focused one-on-one video coaching in preparation for pink team. For a ten-day stretch, we met as a team twice a day and practiced speaker order, smooth transitions, emphasis, chart familiarity, and spotlighting discriminators. In between the two meetings and during the evenings, rehearsals and peer critiquing occurred.

"Once the critiques from pink team were all digested, we applied the suggestions and moved ahead in preparation for red team with the same zeal and demanding schedule. We relied even more on peer coaching for the video coaching. The quality I desired was beginning to emerge.

"Red team went well, with more positive than negative feedback. Now it was a matter of polishing the entire multi-hour presentation. We started spending considerable time rehearsing for Questions and Answers. We studied the individuals most likely to sit on the source selection board and the questions they would most likely ask. We also analyzed all possible 'Murphys' that could go wrong at any stage. In view of these 'Murphys,' each presenter had been assigned a backup from the beginning. Each presenter and his/her backup spent considerable time together rehearsing. I required a few team presentations with only the backups. At this point, we were practicing seven days a week.

"Around this time we were hit with schedule changes from the customer. That was a real challenge since the team also had "real" jobs that were waiting for them. The falling dominoes of major time adjustment had to be worked out and it wasn't easy. We had previously learned where the orals would be held and were able to get into the room at night to observe the surroundings. From this intelligence, we recreated the room on our premises and had our dress rehearsals there. This included placing masking tape on the floor indicating walls, fixtures, and barriers. Then we duplicated the positioning of tables, chairs, risers, electrical equipment, doors, and windows. It was our 'war room.'



Teamwork and cooperation pay off!

Because of their efforts, their company was awarded a $400 million job, over a three-year period, with five renewal option years.

"We even had a wardrobe check one week prior to the event. Some team members had never owned a suit or tie nor did they know what shoe polish was. All that changed.

"D-Day finally arrived. The team performed tremendously well! I was so proud of them. The only glitch was a spilled glass of water on an important cue card. Luckily, the 3x5 'cheat sheet' notecard was laminated — one of a huge list of our 'Murphy Contingencies.' We had tried to anticipate anything that could go wrong and our efforts worked.

"After the event we celebrated with a big meal. A feeling of accomplishment hung in the air. We were confident we had done the needed job. The team was exhausted but relieved.

"Weeks later they learned they had WON! Intensely working day and night for six weeks had paid off. Because of their efforts, their company was awarded a $400 million job, over a three-year period, with five renewal option years. It also opened the door for more contracts with the same customer. The coaching process was demanding, but it brought great results. It was all worth it!"

As orals requirements are now the norm in contracting, there's no time like the present to begin working on your orals strategy. Look to your future business development and proposal needs and get moving!

A Call for Action

Orals requirements are now the norm in government contracting. Some RFPs do not even ask for a written component anymore. In the future, successfully capturing contracts will increasingly depend on an effective orals team presentation. Orals coaching has become the secret weapon for winning contracts.

So, it is time to get moving. Look at your future contract needs, talk to your business development department, and, when there are orals requirements, push for a quality orals coach. There are several experienced orals coaches out there helping organizations capture contracts. Engage one — it may be the deciding factor in winning your next big contract.

Endnotes

[1]DeVore, C. and T. Moler. "US Department of Defense B&P Expenditures on the Rise," *Proposal Management*, (Fall/Winter 2002) pp. 11-12.

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Article

How Do Reviewers Really Evaluate Your Proposal?

What the Cognitive Science of Heuristics Tells Us About Making Decisions

By Jayme A. Sokolow, Ph.D.

We make dozens of judgments each day quickly and with minimal amounts of information. Can I trust this person? Should I buy this product? Should I cancel or attend the afternoon meeting? Since the 1950s, psychologists and social scientists have been studying how people make day-to-day judgments in an uncertain world. Their findings have important implications about how reviewers evaluate proposals.

Baseball and Heuristics

Baseball is a clear example of people committing to rapid decision making.

Throughout a major league baseball game, probably no player has to make more rapid decisions than the catcher. Before the delivery of each pitch, he has to flash a hand signal to the pitcher about the best pitch to throw. Should the pitcher throw a hard outside fastball, a slow curve, a screwball, or some other pitch?

According to former major league catcher Tim McCarver, the catcher must make these decisions extremely rapidly, normally within a few seconds. "You have to put down a sign quickly. The first one is going to be the right one," according to Carver.

Gerd Gigerenzer, the Director of the Center for Adaptive Behavior and Cognition, Max Planck Institute for Human Development in Berlin, agrees with Carver about the need to make intelligent decisions rapidly in baseball and other endeavors. "Isn't more information always better?" he rhetorically asks. "Why else would bestsellers on how to make good decisions tell us to consider all pieces of information, weigh them carefully, and compute the optimal choice, preferably with the aid of a fancy statistical software package?"

"But how do real people make good decisions under the usual conditions of little time and scarce information? Consider how players catch a ball – in baseball, cricket, or soccer. It may seem that they would have to solve complex differential equations in their heads to predict the trajectory of the ball. In fact, players use a simple heuristic. When a ball comes in high, the player fixates the ball and starts running. The heuristic is to adjust the running speed so that the angle of gaze remains constant – that is, the angle between the eye and the ball. The player can ignore all the information necessary to compute the trajectory, such as the ball's initial velocity, distance, and angle, and just focus on one piece of information, the angle of gaze."

Proposal reviewers use a limited set of decision-making strategies and techniques, on average taking a little over six minutes, to make a decision.

Gigerenzer and his Adaptive Behavior and Cognition Group have been examining smart heuristics, the mental frameworks or adaptive cognitive toolboxes ordinary people use to solve problems and make good decisions with limited information and time. Gigerenzer is not alone in his focus. Since the 1950s, psychologists and social scientists have been studying how people in the Western world make day-to-day judgments in an uncertain world. Although these studies have been applied to business, economics, jurisprudence, and other fields, to my knowledge only one proposal professional has argued that the cognitive science of heuristics has something to teach us about proposals – Dr. Tom Sant, the founder and Chief Executive Officer of The Sant Corporation, Inc.

Fast and frugal heuristics yield fairly accurate judgments and predictable errors or biases.

In Sant's *Persuasive Business Proposals: Writing to Win More Customers, Clients, and Contracts* (2nd Edition, 2004), he uses evidence from Gigerenzer's *Simple Heuristics That Make Us Smart* (1999) to argue that proposal reviewers use a limited set of decision-making strategies and techniques, on average taking a little over six minutes, to make a decision.

After reading an excerpt from Sant's *Persuasive Business Proposals* in the Fall/Winter 2003 issue of *Proposal Management*, I read Gigerenzer's *Simple Heuristics That Make Us Smart*. His stimulating book led me to other books and articles on heuristics, and I became convinced that proposal professionals could learn a great deal about improving their proposals from studying the cognitive science of heuristics.

The core idea of the heuristics approach is that most people use fast and frugal heuristics rather than formal and extensive reasoning to make everyday decisions and solve problems. These heuristics usually yield fairly accurate judgments and predictable errors or biases. This argument may appear rather obvious to those of us who do not teach in colleges, universities, and research institutes, but it actually represents a major cognitive advance in our understanding of human reasoning and thus heuristics needs to be integrated into our concept of proposal development.

Most people use fast and frugal heuristics rather than formal and extensive reasoning to make everyday decisions and solve problems.

A Short History of Heuristics

The study of heuristics began with the traditional recognition that cognitive processes can be divided into two major systems – intuition and reflection. As Table 1 below illustrates, intuitive judgments are fast, automatic, and seemingly effortless. This form of cognition is skilled, unproblematic, and so successful that individuals usually are unaware of the myriad rapid, intuitive judgments they make on a daily basis.

Under ordinary circumstances, intuition controls our judgments and preferences unless it is overridden by deliberate mental operations that are slower and governed by formal rules. In comparison to intuitive thinking, reflective judgments tend to be more deliberate, more deductive, and require more effort, and they are positively correlated with intelligence, the necessity to solve complex problems, and exposure to statistics.

To illustrate how dependent we are on our intuitive system of judgment for most problems and tasks, try solving this puzzle, which has been used in research on heuristics. A bat and a ball cost $1.10 in total. The bat costs $1 more than the ball. How much does the ball cost?

Most people answer "10 cents" because $1.10 easily divides itself into $1 and 10 cents, and 10 cents seems like the right order of magnitude. One researcher found that 47 of 93 students (50 percent) from Princeton University and 164 of 293 students (56 percent) from the University of Michigan answered incorrectly. The researcher concluded that the students who gave the wrong answer had not bothered to check their calculations and were content to give a seemingly plausible answer that quickly and intuitively came to mind.

By the way, are you still scratching your head over this problem? The answer, which took me a few moments to figure out because I had to use my reflective rather than intuitive judgment, is that the ball cost 5 cents.

Until the late 1950s in economics and other social science disciplines, most research was based on the assumption that humans acted with perfect rationality to optimize their choices. This assumption was forcefully challenged and overturned by Herbert A. Simon (1916-2001), a prolific scholar who began his career as an economist and ended it by studying artificial intelligence at Carnegie Mellon University in Pittsburgh. As a result of studying decision-making in business organizations, Simon argued that people frequently departed from formal decision models because of time pressure, incomplete information, the inability to calculate consequences, and other constraints.

Herbert A. Simon

He called this cognitive process bounded rationality, which focused on the search process needed to make choices and the desire for a satisfactory rather than an optimal solution to everyday problems. Simon was awarded the Nobel Prize in Economics in 1978.

Table 1: Two Cognitive Systems.

	Intuitive Judgment	Reflective Judgment
Process	Automatic Fast Effortless Skilled	Controlled Slow Effortful Rule Application
Content	Perceptions Concrete and Specific Current Causal	Conceptual Abstract Past, Present, and Future Statistics

Source: Adapted from Kahneman and Frederick, "Representativeness Revisited," p. 51, and Kahneman, "Maps of Bounded Rationality, p. 451.

Gradually, psychologists began applying Simon's economic research on bounded rationality to their own discipline. In 1969, two Israeli psychologists, Amos Twersky (1937-1996) and Daniel Kahneman, surveyed 84 participants at the 1969 meetings of the Mathematical Psychology Society and the American Psychological Association about the accuracy of statistical estimates and the replicability of research results by asking them to solve simple mathematical problems. The results were revealing.

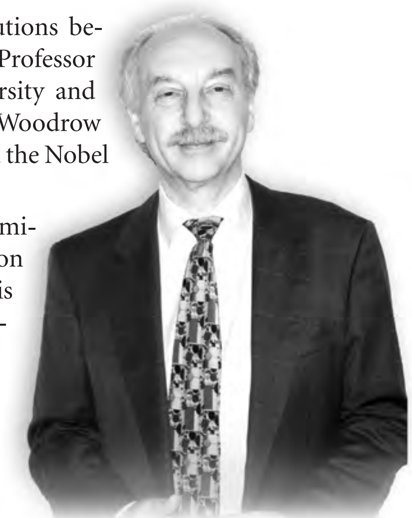
People frequently depart from formal decision models because of time pressure, incomplete information, the inability to calculate consequences, and other constraints.

Although participants in the survey easily could have solved the problems on a piece of paper, they placed far too much confidence in the results of small samples, their statistical judgments showed little or no sensitivity to sample size, and the mathematicians and psychologists gave answers that were often inaccurate. For Twersky and Kahneman, the results of the survey confirmed that the 84 respondents often used intuitive rather than reflective judgments to answer the survey's statistical questions. Thus was born the research program that today is called the heuristics and biases approach.

Twersky and Kahneman built on their survey by studying how people make judgments under uncertain conditions. Their now classic 1974 article, "Judgment under Uncertainty: Heuristics and Biases," established the research agenda for the study of heuristics. Afterwards, they began mapping the cognitive domain of heuristic judgments, demonstrating that reflective decision-making depended on how problems were framed or described, which results in predictable cognitive patterns and errors in judgment.

Daniel Kahneman

Eventually, Twersky moved from Israel to the United States and taught in the Department of Psychology at Stanford University. Kahneman taught at The Hebrew University in Jerusalem and a number of American and Canadian institutions before becoming the Eugene Higgins Professor of Psychology at Princeton University and Professor of Public Affairs at the Woodrow Wilson School. In 2002, he received the Nobel Prize in Economic Sciences.



Gerd Gigerenzer

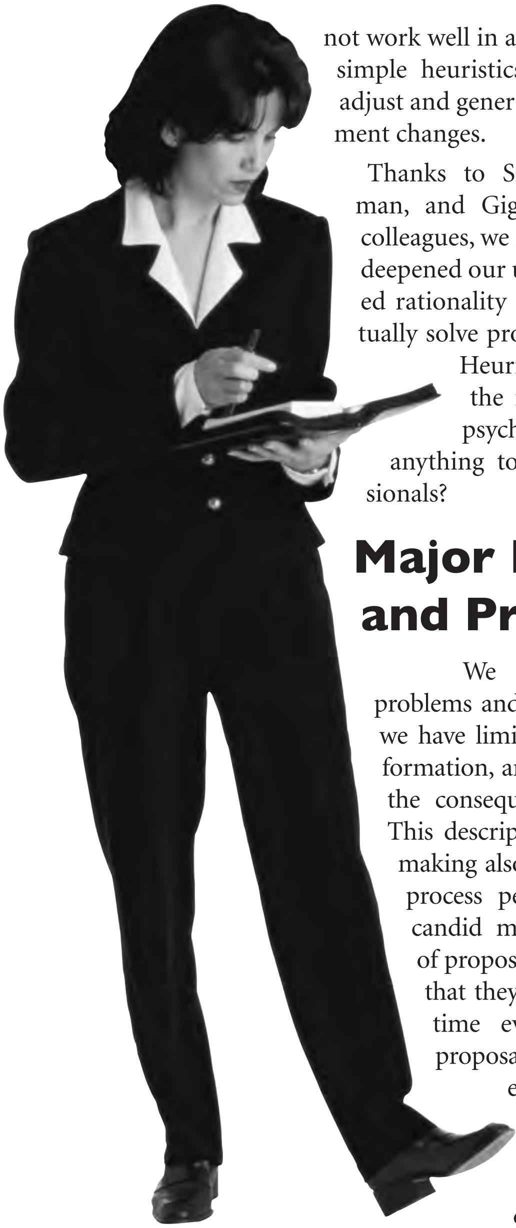
Today, perhaps the most prominent contemporary researcher on heuristics is Gerd Gigerenzer and his colleagues at the Center for Adaptive Behavior and Cognition. Over the last decade, they have written about fast and frugal decision-making, which Gigerenzer believes is how most people actually make reasonable decisions.

As Gigerenzer says, "My work will, I hope, change the way people think about human rationality. Human rationality cannot be understood, I argue, by the ideals of omniscience and optimization. In an uncertain world, there is no optimal solution known for most interesting and urgent problems." According to Gigerenzer, there are three important and interconnected aspects of rationality:

- **Bounded rationality**. When people make decisions, they must arrive at their conclusions using realistic amounts of time, information, and computational resources. Heuristic building blocks include principles for guiding the search for information and solutions, when to stop the search, and when to make decisions.
- **Ecological rationality**. When people make decisions, they exploit the structure of information in their environment. Simple heuristics tap the environment to be fast, frugal, adaptive, and accurate at the same time.
- **Social rationality**. When people make decisions, they exploit the structure of information in the social environment to arrive at adaptive outcomes, usually by interacting with other people. For example, parents must figure out how to help their children and couples who have had a long relationship must decide whether or not to marry.

Gigerenzer and the Center for Adaptive Behavior and Cognition have stressed the importance of ecological rationality in their articles and books. What works in one environment to make fast, accurate decisions may

Simple heuristics allow most people to adjust and generalize when their environment changes.



Some reviewers of proposals probably would admit that they do not spend too much time evaluating an individual proposal.

not work well in another environment, but simple heuristics allow most people to adjust and generalize when their environment changes.

Thanks to Simon, Twersky, Kahneman, and Gigerenzer and his Berlin colleagues, we now have broadened and deepened our understanding of bounded rationality and how individuals actually solve problems in the real world. Heuristics have revolutionized the fields of economics and psychology. But do they have anything to teach proposal professionals?

Major Heuristics and Proposals

We use heuristics to solve problems and make decisions because we have limited time, incomplete information, and often cannot calculate the consequences of our decisions. This description of typical decision-making also fits the proposal review process perfectly. In their more candid moments, some reviewers of proposals probably would admit that they do not spend too much time evaluating an individual proposal, that they may not have enough information to evaluate it thoroughly, and that they are unsure of the long-term consequences for their government agency or business of choosing one proposal over another.

Because all heuristics rely on fast and frugal decision-making, without even identifying specific heuristics we can make three important general recommendations about enhancing the structure and content of our proposals to help proposal reviewers gather and process information as effortlessly as possible. First, develop a comprehensive proposal compliance matrix. Second, use the principles of information design to organize your proposal. And third, depict quantitative evidence, processes, and cause and effect with clear and compelling visual explanations.

Provide your reviewers with a clear, logical, and easy-to-follow roadmap.

Develop a Comprehensive Proposal Compliance Matrix

At a minimum, your proposal should be responsive to and compliant with the Request for Proposals (RFP). By developing a detailed tabular proposal compliance matrix that matches the RFP requirements to your proposal sections, you provide reviewers with a clear, logical, and easy-to-understand roadmap to demonstrate your compliance with the RFP and to find information easily. As David H. Herndon has argued, a compliance matrix helps evaluators in six important ways:

- It lists all the relevant RFP sections and then maps where these sections are found in the proposal.
- It demonstrates that the RFP sections are addressed in the order in which they occur in the RFP.
- It helps the reviewers evaluate the content of the proposal.
- It provides reviewers with a handy checklist to verify the inclusion of all required sections.
- It demonstrates that you have addressed all the required sections and thus enables reviewers to more easily make comparative judgments to the detriment of your competitors.
- It helps ensure that you have addressed all the relevant RFP sections.

For more information about how to develop a proposal compliance matrix, see Herndon's "RFP Response Mapping and Compliance Identification" in the Fall 2001 issue of *Proposal Management*.

Reviewers neither know nor care about your proposal development process.

Use the Principles of Information Design to Organize Your Proposal

Information design has two meanings among proposal professionals. It refers to the overall process of developing your proposal and to the ways in which information is presented in your proposal. Reviewers neither know nor care about your proposal development process, but they are very interested in the design of your proposal because it greatly affects their ability to gather and process the information they need to evaluate it.

According to Dr. Roger Munger, proposals should adhere to the following principles of information design to "make it easy for evaluators to quickly find and understand the information that interests them":

- **Create interest** by breaking the expected rectangular design of the proposal page by using a ragged right justification, lists and graphics, tables, headings that stand out, visuals, and informative headers and footers.

- **Meet expectations** by organizing your proposal to reflect the RFP requirements or the evaluation criteria and by using the vocabulary of the RFP to label the sections and headings in your proposal.
- **Reveal structure** by including an Executive Summary, a detailed table of contents, a compliance matrix, frequent headings, and topic sentences at the beginning of your paragraphs.
- **Facilitate navigation** with an Executive Summary, a table of contents, page and section numbers and letters, headers and footers, chapter and section titles, dividers and tabs, cross-reference tables, a glossary, and a compliance matrix.
- **Create manageable chunks of information** by breaking the proposal narrative into small units and by grouping related information together.
- **Prioritize information** by using different type sizes, type weights, indentation, and numbering systems.
- **Differentiate information types** with themes, section summaries, lists, captions sidebars, and visuals.

Use visuals to present large amounts of information that are compact, accurate, adequate for the purpose, and easy to understand.

For more information about using the principles of information design in proposals, see Munger's "Information Design: Strategies to Make Your Proposal Reader Friendly" in the Spring/Summer 2003 issue of *Proposal Management*.

Depict Quantitative Evidence, Processes, and Cause and Effect with Effective Visual Explanations

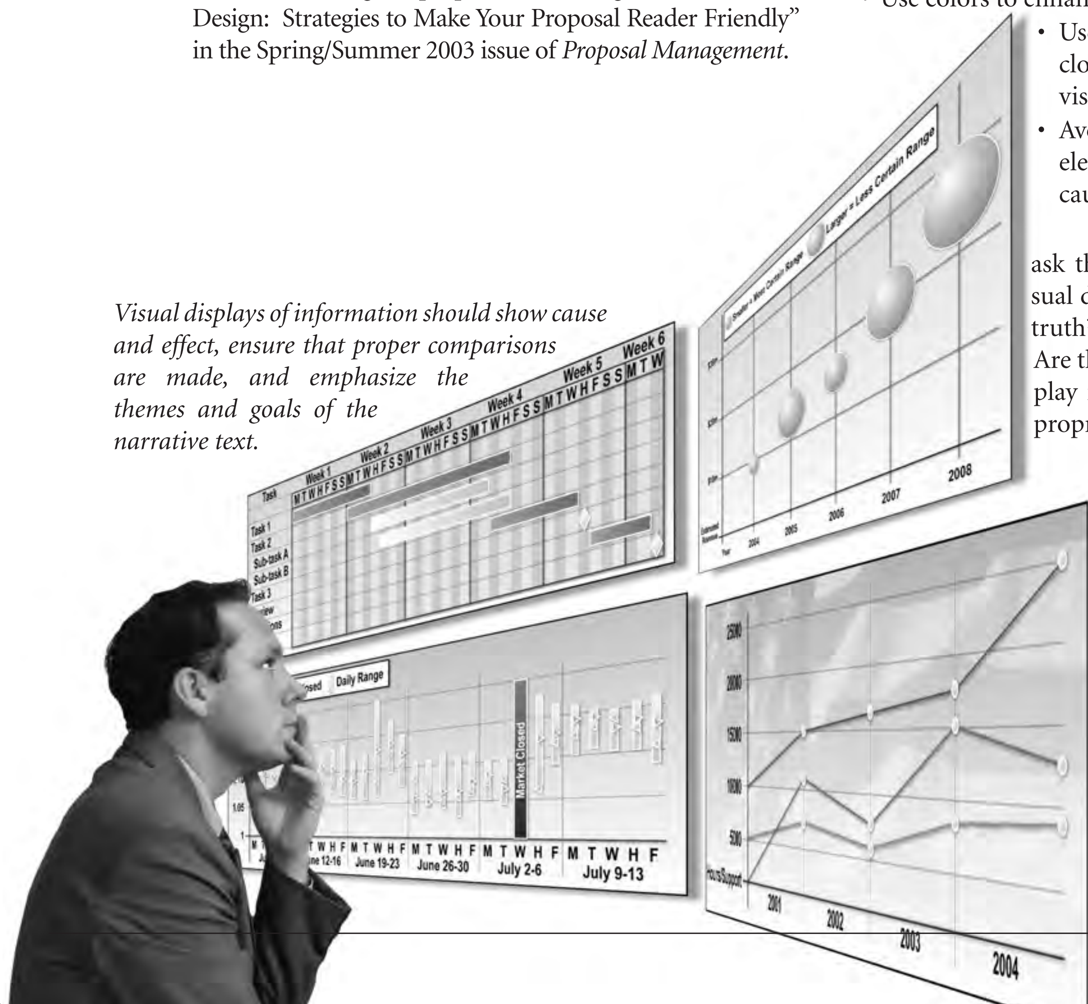
According to Edward Tufte, our national expert on the visual display of information, on paper all communications take place in a static and staid two-dimensional environment he derisively calls flatland. But the world is complex, dynamic, and multidimensional. Tufte's solution is to use visuals to present large amounts of information that are compact, accurate, adequate for the purpose, and easy to understand. Visual displays of information should show cause and effect, ensure that proper comparisons are made, and emphasize the themes and goals of the narrative text.

Give people clear, stimulating high-density data so [evaluators] can exercise their full mental powers.

According to Tufte, proposals should adhere to the following principles of visual design to engage evaluators and help them better understand the document:

- Show the data. Visuals, according to Tufte, are "intelligence made visible."
- Give people clear, stimulating high-density data so that they can exercise their full mental powers.
- Use colors to enhance data comprehension.
- Use words, numbers, and visuals in close proximity, and integrate the visuals with the text.
- Avoid "chartjunk," decorative visual elements that provide no data and cause confusion.

Above all, Tufte wants us to ask the right questions about our visual displays. Does the display tell the truth? Is the representation accurate? Are the data documented? Do the display methods tell the truth? Are appropriate comparisons, contrasts, and contexts shown? For more information about how to use visuals effectively in proposals, see Tufte's stunningly illustrated **The Visual Display of Quantitative Information** (1983), **Envisioning Information** (1990), and **Visual Explanations: Images and Quantities, Evidence and Narrative** (1997).



Visual displays of information should show cause and effect, ensure that proper comparisons are made, and emphasize the themes and goals of the narrative text.

Heuristics: A Roadmap

Psychologists, economists, and other researchers differ about the kinds of heuristics people most frequently use in their everyday lives. They also have different names for the same heuristics, further confusing non-specialists. They do agree, however, that heuristics are rational methods of decision-making that are fast, frugal, and surprisingly accurate. Studies of bounded rationality demonstrate that most people use rather simple and straightforward procedures to solve most problems and make choices.

Nomenclature aside, the five most common heuristics are the recognition heuristic, one-reasoning heuristics (take the best, take the last, and the minimalist heuristic), and the affective heuristic. They are briefly described in Table 2.

The Recognition Heuristic

The simplest and most common heuristic that people use in their daily lives is the recognition heuristic, which divides the world into unrecognized objects, ideas, people, or other topics—and everything else. It works very quickly and with limited knowledge. In fact, it actually works best with a strong dash of ignorance.

Nothing is simpler and more direct than recognizing and recalling relevant cues, which seems perfectly tailored to the evaluation of proposals.

The building block that it uses for decision-making is extremely straightforward: recognition. Once an individual recognizes something from his or her memory, the search for information immediately stops. Because the recognition heuristic is extremely simple, fast, and frugal, it is heavily dependent on recalled content and the experienced ease of recall.

The recognition heuristic even works under difficult medical conditions. In one experiment, a hospital decided to classify heart attack patients using only a maximum of three cues to determine whether they should be labeled as low or high risk. First, if the patient had a systolic blood pressure of less than 91, he or she was immediately classified as high risk. If not, the second cue was age. If patients were under 62.5 years of age, they were classified as low risk. If, however, they were older, then a third cue – the presence of sinus tachycardia – was used to classify them as low or high risk.

The Recognition Heuristic works best very quickly, with limited knowledge and a strong dash of ignorance.

This classification system requires a physician to answer a maximum of three yes/no questions to diagnose a heart attack patient. No complex computational measurements, computerized software programs, and complex cause and effect predictors are used. Despite its simplicity, however, it is actually more accurate in classifying heart attack patients according to risk status than more complex and statistical methods.

Other experiments have demonstrated similar results. People using the recognition heuristic can make accurate inferences and decisions that compare favorably with more sophisticated calculations. According to Gigerenzer and his colleagues, although it appears counterintuitive, an intermediate amount of recognition information usually yields the highest proportion of correct answers and good choices. In the case of recognition, too much knowledge can be a dangerous thing.

Table 2: Types of Heuristics.

Type	Approach
The Recognition Heuristic: judgments actually are made based on a lack of knowledge.	If a clue is recognized and it coincides with the evaluation criteria, it wins.
One-reasoning Heuristics: decisions are made with a single piece of information.	
Take the Best	Find clues, assign values, and take the best clue. It works best in environments where individuals know the signs for cues and which are considered more valid than others.
Take the Last	Use clues from the past, assign values, and pick the last clue. It works best in environments where individuals understand the cues but have trouble deciding which cues are more valid than others.
Minimalist	Search for random clues, repeat until one works, and assign values. It works best in environments where individuals do not know which cues are better predictors for making decisions than others.
The Affective Heuristic: the affect helps bestow meaning on judgments.	How do we feel about it? Moods and feelings influence heuristic judgments and mental processing strategies. In fact, they are indispensable in making sound judgments and reflective decisions.

The recognition heuristic in proposal evaluation is based on a deceptively simple approach. If you are given two or more options that you may or may not have encountered before and there is a positive relation between recognition and the evaluation criteria, you have to determine which of the options has the higher value. If one option is recognized and it coincides with the evaluation criteria, then you will select the recognized object. If you cannot recognize any of the options, you will conclude that none of them match the evaluation criteria.

Recognition is a powerful heuristic because a search that relies on recognizing cues makes less demands on memory and computational skills than a search for alternatives. This is especially true under time pressure, when individuals are apt to use simple strategies to solve problems and make decisions. Nothing is simpler and more direct than recognizing and recalling relevant cues, which seems perfectly tailored to the evaluation of proposals.

Because the recognition heuristic is so widely used, you should organize the structure and content of your proposals to help reviewers quickly recognize that you have fully responded to the evaluation criteria, assuming that you have actually addressed them. To accomplish this goal, undertake the following in your proposal:

> *Recognition may appear to be a very elementary approach to solving problems and making decisions, but it is widely used by everyone, including evaluators.*

- Organize your information by: (1) structuring the proposal according to the RFP instructions; (2) discussing your points in decreasing order of importance; (3) summarizing your major points and benefits throughout the proposal; and (4) focusing on the needs and mission of the agency or business. By discussing your points in descending order, later you can more easily decide what to cut or keep as you edit your proposal.
- Develop no more than five major theme statements that are directly linked to the evaluation criteria and use them to organize the content of your proposal.
- Ensure that all your major theme statements have solutions, benefits, and proof.
- Write your Executive Summary for non-technical reviewers.
- Link your benefits and features clearly to the evaluation criteria.
- Write simply and clearly. Use short sentences and paragraphs. Use plenty of white space. Use the active voice. Begin paragraphs, whenever possible, with a thesis statement.
- Use plenty of bulleted lists and numbered lists to make important points.
- Use headings with the exact wording from the RFP.
- Use color visuals to emphasize your benefits, features, and major themes.

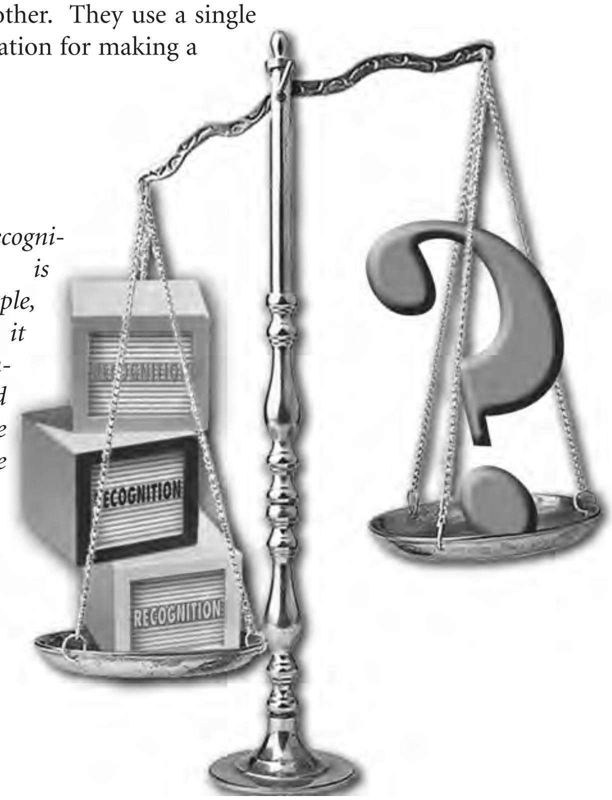
Recognition may appear to be a very elementary approach to solving problems and making decisions, but it is widely used by everyone, including evaluators. In proposals, as in life, cues and clarity foster recognition and recall.

> *Heuristics based on limited searches must employ clear and simple stopping rules that enable people to choose...they use a single piece of information for making a decision.*

One-Reasoning Heuristics: Take the Best, Take the Last, and the Minimalist Heuristic

Many of our everyday decisions go beyond mere recognition. Often, we must determine which objects score higher on a scale of decision criteria by undertaking a fast and frugal limited search. We do not look up all the available information and we make a decision using only a fraction of the information we have studied. Heuristics based on limited searches must employ clear and simple stopping rules that enable people to choose between options based on the first identified cue that favors one option over another. They use a single piece of information for making a decision.

Because the recognition heuristic is extremely simple, fast, and frugal, it is heavily dependent on recalled content and the experienced ease of recall.



As in the recognition heuristic, the goal is to determine which object has the higher value based on the decision criteria. One-reasoning heuristics always use a basic four-step process. First, you select the cue criterion or criteria. Second, you look for the corresponding cue values for each object. Third, you stop and choose the object with the greater value according to the criteria. And last, if you cannot distinguish among the cue values of the objects, you return to the beginning of the process and look for other cue criteria to make a decision.

Find the object with the higher value – "Take the best, ignore the rest."

For example, let us assume that you are interested in mountain hiking. You have identified proposals from several trekking organizations. Your task is to choose between two outdoor adventure treks in Nepal – one to the Annapurna Base Camp and the other to the Everest Base Camp. Your most important criterion is the potential for active outdoor adventure. Because you recognize both destinations, you look for the cues that you believe are most important – whether the trip involves strenuous climbing and great views of the Himalayas. You determine that the trek to the Everest Base Camp involves climbing from 8,000 to about 16,000 feet above sea level, that the sky is often cloudy throughout the year, and that from the Base Camp it is difficult to see the summit of Mount Everest.

You determine that the trek to the Annapurna Base Camp involves an ascent from 3,000 to about 13,000 feet above sea level, that the sky is usually very clear throughout the year, and that you should have great views of the entire Annapurna Range from the first day of the trek. You conclude that the trek to the Annapurna Base Camp will be your destination.

The three major one-reasoning heuristics are take the best, take the last, and the minimalist heuristic. All three lend themselves to the evaluation of proposals and therefore should be of great interest to us.

Take the Best Heuristic

The take the best heuristic works best in environments where individuals know the signs for cues and which cues are considered better than others, such as clearly delineated proposal evaluation criteria with different numerical values in an RFP.

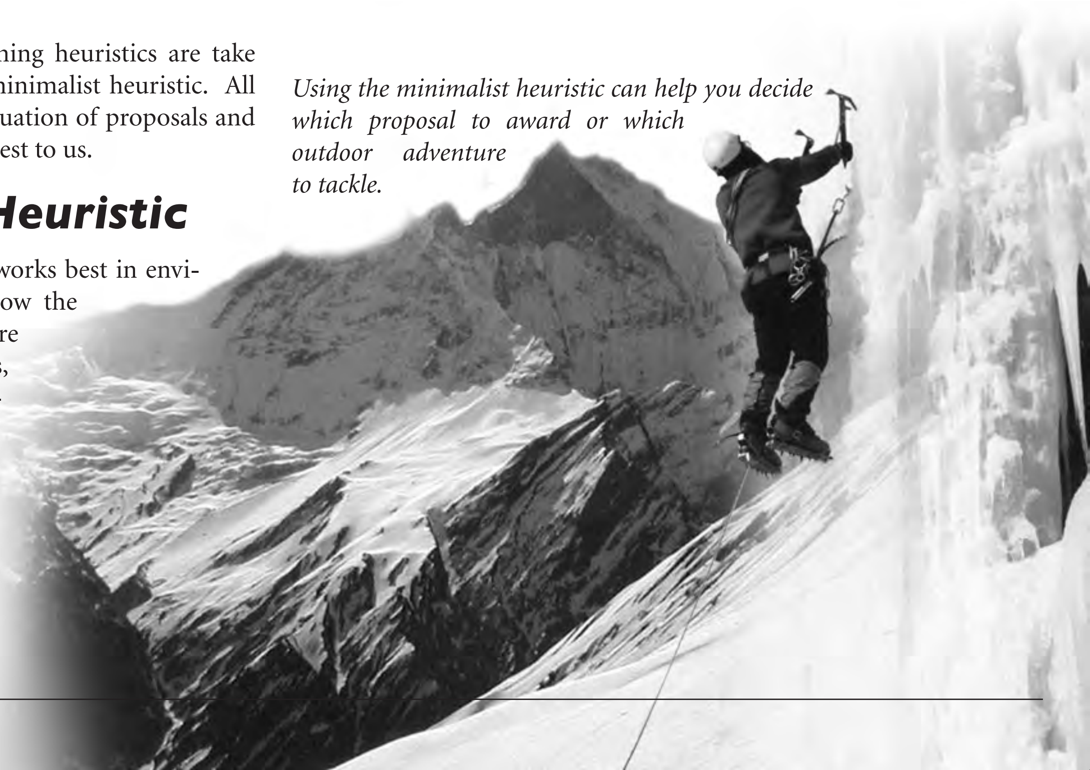
In step one, you attempt to use the recognition heuristic, which states that if one object is recognized according to the cue criterion or criteria, it is the object with the higher value. If no objects are recognized, you must guess which object has the higher value. In step two, if you recognize some or all of the objects, then you choose the cue with the highest criterion or criteria and you initiate a search and look up the cue values of all the objects. In step three, you determine which object has the higher cue value. If you cannot, then you return to step one and search for another cue. Finally, in step four you predict that the object with the positive cue value has the higher value according to the criterion or criteria.

The take the best heuristic orders cues according to their perceived validity. Its goal is to find the object with the higher value, and its motto is "take the best, ignore the rest." The take the best heuristic was the one used to determine that the Annapurna Base Camp outdoor adventure was preferable to the Everest Base Camp trek.

Take the Last Heuristic

The take the last heuristic works best in environments where individuals understand the cues but have trouble deciding which cues are more valid than others. This might occur if a proposal reviewer had criteria of equal value, for example four evaluation criteria worth 25 points apiece for a total score of 100. The take the last heuristic is based on a proven psychological principle: when people work on a series of problems, such as evaluating proposals, they usually begin with the same cognitive strategy they used to solve the previous problem when faced with a new, but similar-looking problem, such as evaluating another proposal.

This heuristic uses a four-step process to make a decision or judgment. First, you attempt to use the recognition heuristic, which states that if one object is recognized



Using the minimalist heuristic can help you decide which proposal to award or which outdoor adventure to tackle.

according to the cue criterion or criteria, it is the object with the higher value. If no objects are recognized, you must guess which object has the higher value. If you can recall which cues stopped the search on a previous problem, choose the cue that stopped the search on the most recent problem. Look up the cue values of the objects. Otherwise, try a random cue and build up new cue criteria. These comprise steps one and two.

The next two steps follow the take the best heuristic. In step three, you determine which object has the higher cue value. If you cannot, then you return to step one and search for another cue. If no objects are recognized, you will guess which object has the higher value. In step four you predict that the object with the positive cue value has the higher value according to the criterion or criteria.

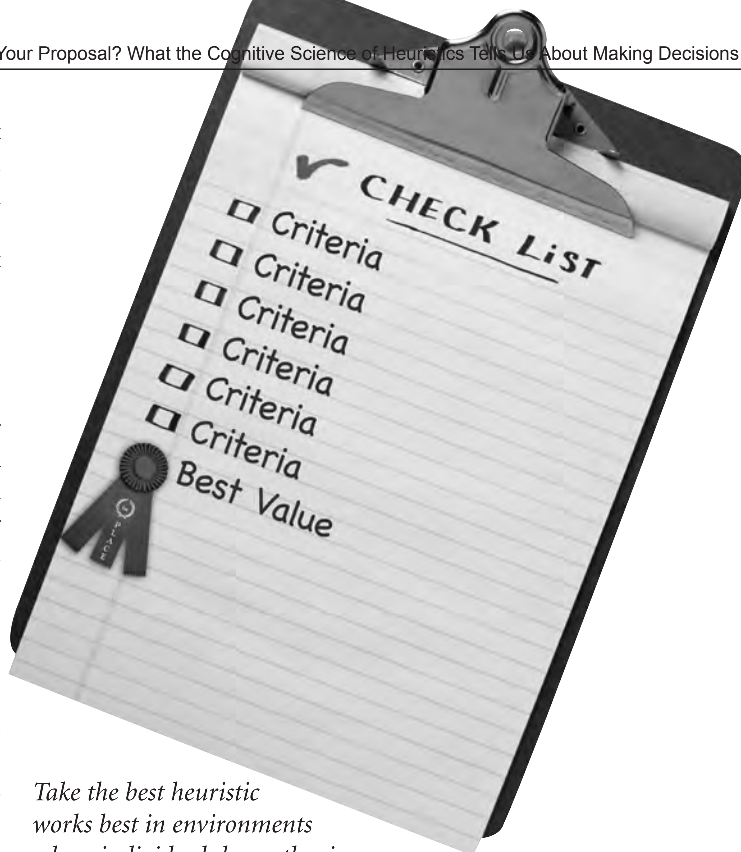
The take the last heuristic's motto is "take the last, ignore the rest." To illustrate how it works, we will apply it to picking another outdoor adventure trek. This year, you must choose between trekking in the Norwegian fiords or trekking through the Swiss Alps, both destinations that you recognize. You perform a memory search and recall that last year the two most important cues were strenuous climbing and great mountain views. You then use these cues to decide this year's outdoor adventure trek. You discover that temperature inversions often obscure the summits of the Alps during the summer, but the Norwegian fiords are clear. Both treks make similar physical demands on trekkers. Based on these cues, you choose Norway.

The minimalist heuristic's motto is "take a random cue until it works."

Minimalist Heuristic

The minimalist heuristic occurs in environments where individuals do not know which cues are better predictors for making decisions than others. This would occur, for example, if an evaluator had: (1) neither read the RFP nor consulted an evaluation form before studying a proposal; or (2) either not read the RFP or not consulted an evaluation form before studying a proposal.

This heuristic uses a four-step process to make a decision or judgment. First, you attempt to use the recognition heuristic, which states that if one object is recognized according to the cue criterion or criteria, it is the object with the higher value. In step two, if no objects are recognized, you must guess which object has the higher value. If you recognize some or all of the objects, then you draw a cue randomly and determine the cue values of the objects. In step three, you determine which object has the higher cue value. If you cannot, then you return to step one and search for another random cue. If no objects are recognized, you will guess which object has the higher value. Finally, in step four you predict that the object with the positive cue value has the higher value according to the criterion or criteria.



Take the best heuristic works best in environments where individuals know the signs for cues and which cues are considered better than others.

The minimalist heuristic's motto is "take a random cue until it works." To illustrate its cognitive framework, we will apply it to yet a third outdoor adventure trek. This year, you must choose between trekking through the Uplands of Latvia or the Black Forest in Germany, both destinations that you recognize. Your two major criteria continue to be strenuous climbing and great mountain views. You next select any cue at random that you think relates to the criteria, such as the height of the mountains. Because the Black Forest has much higher mountains than the Latvian Uplands, you select the outdoor trekking adventure to Germany.

Hindsight bias is common among people in all walks of life, and experts are certainly not immune to it.

Reviewers are likely to make systematic errors in their evaluations because they appear to be built into the way we all use heuristics. Sometimes:

- The manner in which objects, processes, and events are represented leads individuals to misconceive outcomes.
- The manner in which objects, processes, and events are represented makes individuals insensitive to the fact that small samples are less representative than large samples.
- Objtects, processes, and events that easily come to mind might be judged more likely than they actually are.
- Certain information might be considered biased, incorrect, or irrelevant because individuals have had limited exposure to similar events, or because they attract more attention, or because individuals have remembered and recalled them in a particular fashion.
- Individuals hold fast to particular pieces of information and ignore the consequences of additional information.
- Individuals remain wedded to an initial problem-solving method when a change in method would be helpful to them.
- Many individuals are adverse to taking risks.
- Many individuals would rather take a risk than suffer a loss, and thus different problems and solutions trigger different responses depending on whether the problem is framed in terms of gains or losses.

Heuristics and Accuracy

Like the recognition heuristic, these three one-reason heuristics – take the best, take the last, and the minimalist – seem like rather simple psychological mechanisms for making decisions. But simplicity does equate with inaccuracy. In a wide variety of experiments, these three heuristics have been proven to be as accurate or more accurate than complex linear statistical strategies. The good news is that we do not have to choose between simplicity and accuracy. Our thinking can be fast, frugal, and accurate at the same time.

According to Kahneman and Twersky, the use of heuristics also leads to systematic errors and seeming lapses of reason, especially deviations from the laws of probability. This has been confirmed by subsequent research. While fast and frugal heuristics are superbly adapted to our mental and physical world, they are not infallible. When people make decisions based on heuristics, they also tend to make predictable errors. This does not mean that people are irrational, but it does imply that there are limits to the robustness of bounded rationality.

Individuals are apt to rely on their feelings more with increased task demands and decreased cognitive resources.

Because the recognition heuristic and one-decision heuristics are such important elements in decision-making, you should organize the structure and content of your proposals to encourage top-down heuristic thinking rather than a bottom-up systematic processing strategy, which signals to reviewers that there is a problem. To accomplish this goal, you should follow the proposal strategies listed in the section on the recognition heuristic. You should make it very fast and easy for reviewers to find all the essential information they need to conclude that you have been complete and compliant in your proposal.

At the same time, you should be aware that reviewers are likely to make systematic errors in their evaluations because they appear to be built into the way we all use heuristics.

On a lighter note, there is one pervasive bias among heuristic thinkers that deserves our bemused attention: hindsight bias, which is the tendency to believe falsely that you accurately predicted the outcome of an event. Hindsight bias is common among people in all walks of life, and experts are certainly not immune to it. In fact, as long as the records of our judgments and decisions are fortuitously unavailable, the benefits of presenting oneself as being unusually farsighted seem to far outweigh the potential

Rational thought is based on both intuitive and reflective judgment and reasoning depends on a continued ability to experience feelings.

Happy moods encourage individuals to rely on a top-down heuristic processing strategy that relies on preexisting general knowledge while sad moods lead to a more bottom-up, data-driven systematic processing strategy because negative feelings indicate a problematic situation.

liabilities. When the American humor writer S.J. Perelman was asked what he intended to call his autobiography, without a pause he answered, "The Hindsight Saga," with a punning nod to the English novelist Ford Maddox Ford and our own pretensions to omniscience.

The Affect Heuristic

Until recently, affect – a feeling or emotion as distinguished from cognition – has not been considered an important component of human judgment. We now understand, however, that moods and feelings influence heuristic judgments and processing strategies. In fact, they may be indispensable in making any sound intuitive or reflective decisions.

Antonio Damasio, a neurologist, examined the research on patients with damage to their ventromedial frontal cortices of the brain, which impaired their ability to feel affectively but left their ability to think and remember intact. He found that the damage destroyed patients' ability to make rational decisions even though their ability to reason analytically was unimpaired. From his research, Damasio concluded that rational thought is based both on intuitive and reflective judgment and that reasoning "depends, to a considerable extent, on a continued ability to experience feelings."

Psychological research has buttressed Damasio's arguments. Affective feelings guide our judgment and decision-making processes. Happy moods encourage individuals to rely on a top-down heuristic processing strategy that relies on preexisting general knowledge while sad moods lead to a more bottom-up, data-driven systematic processing strategy because negative feelings indicate a problematic situation.

Proposal reviewers are likely to use their feelings because of increased task demands.

In addition, individuals are apt to rely on their feelings more with increased task demands and decreased cognitive resources. When a judgment is difficult to make because the information or task is considered cumbersome, complex, and time-consuming, individuals may make a decision based on their answer to a simple question: How do I feel about it? These findings have important implications for the evaluation of proposals.

Bounded rationality and affect go hand-in-hand. We cannot separate feelings from judgments. If we could, we would be incapable of making rational judgments at all.

For example, in one study of the impact of the affect heuristic on making judgments, individuals were presented with information about the benefits and risks of nuclear power and asked to evaluate them. As Table 3 below indicates, in examples A and B positive information coincided with a positive affective evaluation of nuclear power. In examples C and D, negative information coincided with a negative affective evaluation. In examples A and B, either the benefit was high or the risk was low, leading individuals to evaluate nuclear power positively. In examples C and D, either the benefit was low or the risk was high, leading individuals to evaluate nuclear power negatively.

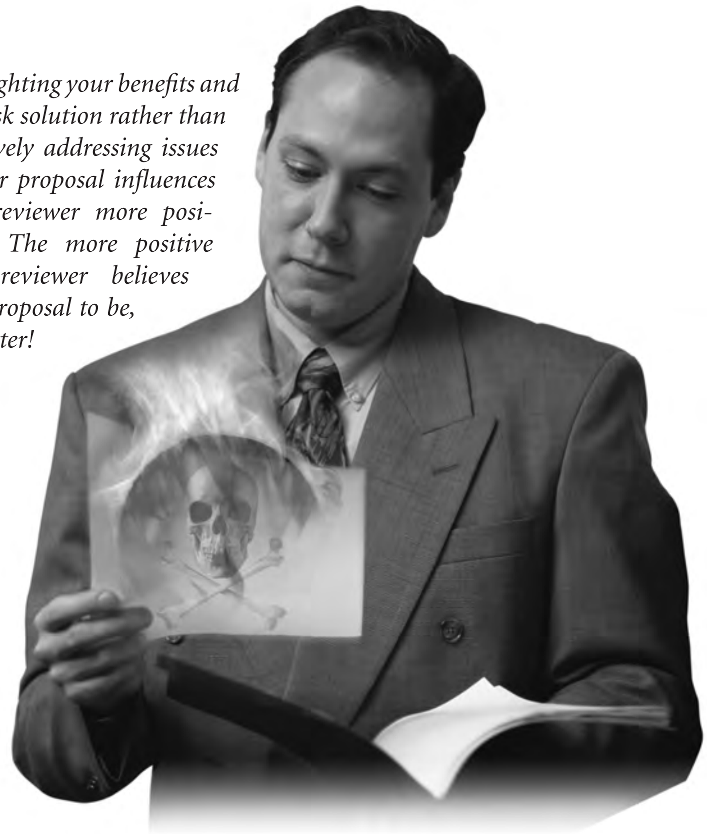
The more negative the affect associated with your proposal, the more likely that it will be judged negatively.

The information about risk changed individuals' feelings about the benefit while the information about the benefit changed individuals' feelings about risk. In this experiment, researchers tried to manipulate the affects by increasing or decreasing the perceived benefit and risk. It worked. When the information changed either the perceived benefit or risk, there was an inverse affective impact on individuals' judgments.

Proposal reviewers are likely to use their feelings because of increased task demands (they usually have full-time positions in addition to their work on evaluation panels) and the perception that the evaluation process is demanding and time-consuming, which undoubtedly is true. Because the impact of affect increases with time constraints, competing deadlines, and competing tasks, proposal reviewers would seem to be prime candidates for asking "How do I feel about it?" to make a decision.

Some proposal professionals might argue that the heavy demands placed on reviewers are actually beneficial to the evaluation of their proposals, for they encourage a detailed bottom-up systematic processing strategy rather than a fast and frugal top-down heuristic processing strategy. But a bottom-up systematic processing strategy may either result from a sad mood on the part of reviewers, or perhaps even worse, induce a sad mood in once happy reviewers, neither of which will benefit the evaluation of your proposal. The more negative the affect associated with your proposal, the more likely that it will be judged negatively.

Highlighting your benefits and low-risk solution rather than negatively addressing issues in your proposal influences your reviewer more positively. The more positive your reviewer believes your proposal to be, the better!



Organize the structure of your proposals to encourage heuristic thinking.

Because affect is such an important element in decision-making, you should organize the structure and content of your proposals to encourage heuristic thinking rather than a systematic processing strategy, which signals to reviewers that there is a problem.

Table 3: Evaluating Nuclear Energy.

Affect	Benefit	Risk
Example A: Positive	Information states that the benefit is high.	Individuals infer that the risk is low.
Example B: Positive	Individuals infer that the benefit is high.	Information states that the risk is low.
Example C: Negative	Information states that the benefit is low.	Individuals infer that the risk is high.
Example D: Negative	Individuals infer that the benefit is low.	Information states that the risk is high.

Source: Adapted from Slovic, Finucane, Peters, and MacGregor, "Affect Heuristic," p. 411.

Affect helps bestow meaning on judgments. One of our challenges as proposal professionals is to overcome the almost inherently negative affect of evaluating proposals with documents that convey positive affective feelings to reviewers.

Taking Heuristics into Account when Developing Proposals

The major heuristics that evaluators use to make decisions about proposals – recognition, take the best, take the last, minimalist, and the affective heuristic – are adaptive mental strategies that have evolved because of the need to make judgments and decisions with bounded rationality, limited amounts of time, and under the stress of competing tasks. Like the rest of us, the cognitive resources of evaluators are limited, and thus they rely on a mental toolbox of fast and frugal techniques to decide which proposals to recommend. Evaluators use as little of the available information in proposals as is possible to make their judgments, which enables them to work in ways that are satisfactory both to themselves and their superiors.

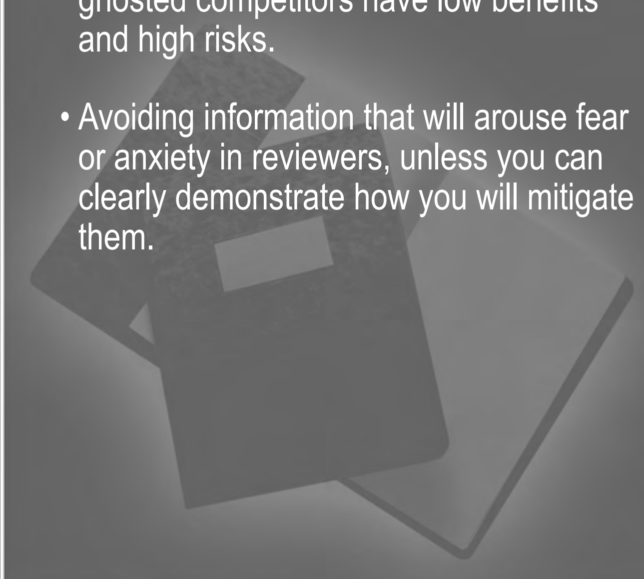
Regardless of the heuristics they use, evaluators employ a simple stopping rule. They terminate their searches when the first good reason appears for one alternative as opposed to another. Evaluators use no other cues after this point. Good decisions do not always require amassing large amounts of information.

In the recognition heuristic, judgments are actually made based on a lack of knowledge. Heuristics involving one-reason decision making – take the best, take the last, minimalist – use a single piece of information for making a decision. The affective heuristic, in contrast, relies on making a decision based on the answer to a simple question: How do I feel about it?

One of the challenges as proposal professionals is to overcome the almost inherently negative affect of evaluating proposals with documents that convey positive affective feelings to reviewers.

Encourage heuristic thinking rather than a systematic processing strategy in your reviewers by:

- Conveying an upbeat feeling of confidence by emphasizing your company's strengths, accomplishments, and ability to perform work well, on-time, within budget, and to the complete satisfaction of your customers.
- Emphasizing positive ideas, words, and visuals. Be affirmative, not negative, because there is a strong association among imagery, affect, and decision-making.
- Demonstrating that there is a high probability that your solution will be successful. People associate high probabilities with positive affect and low probabilities with negative affect.
- Linking your benefits and features, with the benefits stated first.
- Emphasizing that your solution has high benefits and low risks.
- Emphasizing that other solutions and ghosted competitors have low benefits and high risks.
- Avoiding information that will arouse fear or anxiety in reviewers, unless you can clearly demonstrate how you will mitigate them.



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

- Develop a comprehensive proposal compliance matrix.
- Use the principles of information design to organize your proposal.
- Depict quantitative evidence, processes, and cause and effect with clear and compelling visual explanations.
- Promote the use of the recognition heuristic by: (1) structuring the proposal according to the RFP instructions; (2) discussing your points in decreasing order of importance; (3) summarizing your major points and benefits throughout the proposal; and (4) focusing on the needs and mission of the agency or business.
- Promote the use of one-reason decision heuristics by making clear linkages between: (1) benefits and features; and (2) solutions and evaluation criteria. Make them very easy to find and understand.
- Provide plenty of cues throughout the proposal, such as theme statements, differentiated headings, different fonts, bulleted lists, and numbers.
- Convey an upbeat and positive feeling of confidence throughout your proposal.
- Emphasize that your solution entails low risks and high benefits, which is the opposite of your competitors.

Although these heuristics may appear simple and even simple-minded, they work well. When compared to computationally complex methods such as multiple regression analysis, they perform quite robustly. In fact, ignorance-based and one-reason decisions are most appropriate for tasks where one of two options must be selected. Consequently, these heuristics are tailor-made for the evaluation of proposals. There are predictable biases and errors built into these heuristics, but they are adaptive for those who actually use them.

Heuristics may not provide optimal solutions, by they do provide satisfactory solutions, and for most of us, that is most important.

When analyzing proposals, evaluators take mental shortcuts by using heuristics. In this way, they conserve their cognitive resources and make judgments with limited time. Heuristics may not provide optimal solutions, but they do provide satisfactory solutions, and for most of us, that is most important.

Because reviewers use heuristics to evaluate proposals, proposal professionals should develop the proposal's structure and content so that reviewers can clearly understand it and extract the information they need quickly and effortlessly. If they cannot achieve these tasks, reviewers are likely to abandon heuristic reasoning and use a bottom-up processing strategy with a negative affect that does not bode well for a proposal.

Our challenge as proposal professionals is to create proposals that encourage reviewers to use simple heuristics. Although this appears straightforward, it may be hard to accomplish because our proposals tend to be very detailed and complex, probably needlessly so, and thus often difficult to understand.

Perhaps the most important conclusion that proposal professionals can draw from the study of heuristics is this: good proposals that are easy to evaluate are more likely to be scored higher than great proposals that are difficult to evaluate. Proposals should be designed so that reviewers can evaluate them fast, frugally, and with as little mental effort as possible. Sometimes, as heuristics demonstrate, less is more.

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The author would like to thank Rich Freeman for his review of this article.

With so many ideas, feelings, beliefs, immediate desires, and experiential cues affecting a reviewer's opinion of and ultimately the judgment on your proposal, it's a wonder any information is processed at all!

Jayme A. Sokolow, Ph.D., is founder and president of The Development Source, Inc., a proposal services company located in Silver Spring, MD, that works with businesses, government agencies, and nonprofit organizations. He is also Assistant Managing Editor and Chair of the Editorial Advisory Board of Proposal Management. He can be reached at JSoko12481@aol.com.

The Capture Management Life-Cycle

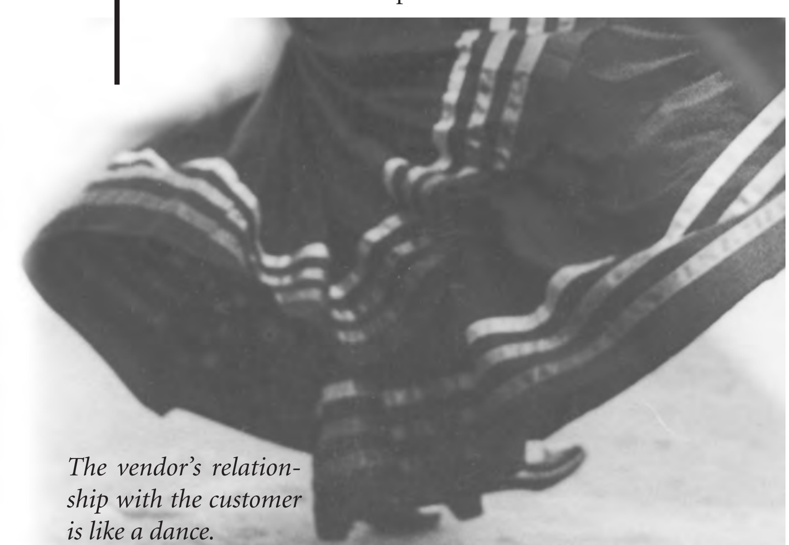
By Gregory A. Garrett and Reginald J. Kipke

Publisher: CCH Incorporated, 2003

Reviewed by
Ali Paskun, Lead Proposal Manager
Technical and Management Services Corporation (TAMSCO)

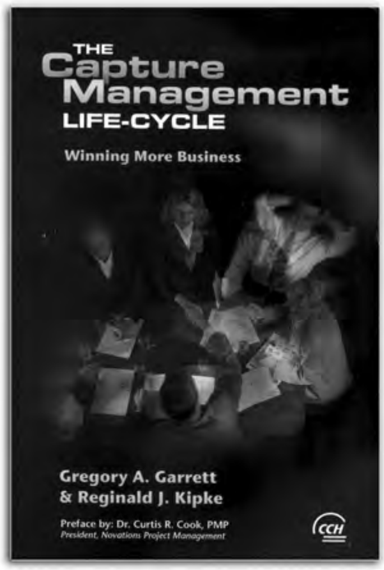
This book is not another "how to" manual for sales, business development, and proposal professionals. It goes beyond being a tutorial on the basics of capture/proposal management and presents an approach that shows how an organization can win more business. The authors liken a vendor's relationship with the customer to a dance, and present methods to implement a Capture Management Life-cycle model that will "illustrate the stages or dance steps required for a supplier to win more business, improve execution, and achieve high customer loyalty."

Garrett and Kipke have surpassed the usual textbook style of a reference book and written a resource manual that is practical, thought-provoking, and useful. The chapters are arranged for ease of reference, and each one builds on the information presented in the previous one. Each chapter contains best practices, tools, and techniques in an easy-to-understand manner that any professional—whether novice or expert—will find useful and want to implement.



The vendor's relationship with the customer is like a dance.

Chapter 1, "What it Takes to Win More Business," provides an overview of the current business environment and the challenges facing suppliers. But Garrett and Kipke take this discussion one step farther and show a direct correlation between creating value for the customer and developing customer loyalty. They illustrate the value of customer loyalty as a connection to increased revenue and profits.



The Capture Management Life-Cycle is described in Chapter 2 as a process consisting of three phases and 10 stages that is "…all about winning new business by creating mutually beneficial offers which solve the customer's business problems or objectives and meet your corporate requirements for profitability and risk." The overview of the process provided in this chapter emphasizes its flexibility and shows how it can be applied to any business environment (federal vs. commercial, small start-up vs. large corporation, and local vs. global).

The three phases and 10 stages of the Capture Management Life-Cycle are:

1. Pre-Bid Phase
   - Opportunity Profile
   - Stakeholder Buy-in
   - Capture Project Plan
2. Bid Phase
   - Capture Team
   - Kickoff Bid Development
   - Bid Reviews
   - Stakeholder Approval
3. Post-Bid Phase
   - Negotiations and Contract Formation
   - Contract Fulfillment
   - Opportunity Growth

**The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Managing Editor John Elder at jelder@caci.com.*

Chapters 3-8 break out the three phases and 10 stages of the Capture Management Life-Cycle and describe each in detail. These chapters provide an excellent discussion of all the key steps in each phase and describe how these steps contribute to the goals of winning new business and gaining customer loyalty. Case studies from companies such as Microsoft, Northrop Grumman, CACI International, Inc., and NCR Professional Services are included to demonstrate the real-world applications of the Capture Management Life-Cycle.

What makes this reference book especially useful is the "Questions to Consider" section included at the end of each chapter. How often does a professional have the time to evaluate how effectively his or her organization manages customer expectations or how well it documents and shares capture management lessons learned? These questions and the others in the book are designed to assess how effectively an organization uses the information contained in a specific chapter by helping to determine if that step in the model is currently implemented at the organization; if not, why not; and if so, is it being used effectively.

Each chapter also includes processes, inputs, tools, techniques, templates, and outputs to help the reader easily implement the Capture Management Life-Cycle. The inputs list what is needed to complete a specific stage (e.g., one input for the Bid Development stage is a well-documented proposal development plan), while the outputs list what final product should be achieved at the end of the stage, such as developing a winning proposal in the Bid Development stage. In between, the authors present tools and techniques that show the reader step-by-step how to attain the desired outputs. The tools and techniques are practical tools every business development or proposal professional would find useful. For example, sample forms, such as a capture team kickoff agenda, a negotiation planning summary, and a risk mitigation plan, are reproduced throughout the book. The authors also make extensive and practical use of graphics and diagrams to illustrate essential features of each phase or stage. Each graphic is easily understood, appropriate, and well-done.

After the detailed discussion of the Capture Management Life-Cycle, Chapter 9 provides a survey of the different types of commercially available information technology tools that are available to streamline the capture management process. The chapter includes sections that describe the various tools for meetings, sharing documents, proposal development and production, and integrated tools to manage the Capture Management Life-Cycle and ensure information security.

Chapter 10, "Going Global – Opportunities and Challenges," covers the timely topic of tracking multi-national business capture opportunities. Recent events such as the continued growth of the European Union have had a major impact on how countries do business with each other. The chapter provides an interesting and in-depth presentation of the subject, including an explanation of the various international trade organizations and agreements such as NAFTA, and defines the challenges and forces facing an organization pursuing business internationally. For example, two tables included in the chapter list the individual and core organizational competencies necessary to succeed in the global marketplace.

In addition to the "Questions to Consider," there are two appendices that provide opportunities for organizational assessment. Appendix A contains a Capture Management Organizational Assessment Tool (CMOAT) that is comprised of a four-step process to determine an organization's capacity to win business and evaluate past performance. The CMOAT is probably the best feature of the entire book because it offers a process to easily quantify the success of an organization's capture management capabilities and to identify areas where changes can increase the win rate.

Appendix B is an adaptation of the article, "Proposal Automation Products," by Greg Wilson from the *Journal of the Association of Proposal Management Professionals*, Spring 2001 (in fact, there are several references from either the *Journal* or other publications written by APMP members). This appendix contains a matrix of automation tools that includes the features/capabilities, training and support, and price of each tool. It can help determine if an organization can increase its ability to win business by using automation products.

What a treasure this handbook is! The authors have provided an approach to the entire capture management process that encompasses a variety of tools, techniques, and best practices, instead of just addressing a part of the process, i.e., proposal development. They have integrated this information into a reference manual that all business professionals can use to determine where their organization is now and where it needs to go to meet the current challenges of "the new supply environment." Not only should these professionals have a copy of this book on their desks, but the pages should be well-worn.

These proposal professionals have a copy on their desks – do you?

Changing Minds: The Art and Science of Changing Our Own and Other People's Minds

By Howard Gardner

Publisher: Harvard Business School Press, Boston, MA, 2004, Retail Price: $26.95

Reviewed by
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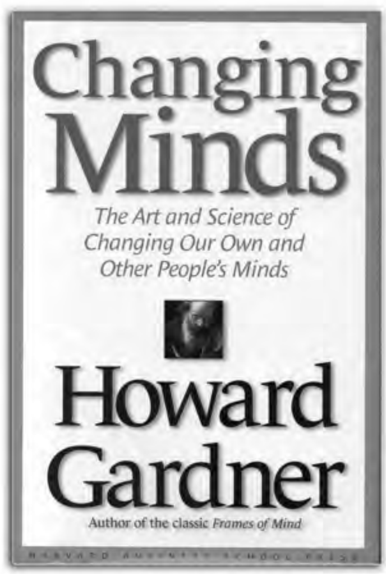
"Think about the last time you tried to change someone's mind about something important: a voter's political beliefs; a customer's favorite brand; a spouse's decorating taste; a teenager's attitude toward schoolwork. Chances are you weren't successful in shifting that person's beliefs in a significant way." Changing someone's mind is never easy regardless of whether it is advertisers trying to prove their product is the best on the market, a politician vying for the swing vote, a teacher presenting a controversial theory to the class, a business leader implementing a new corporate culture, or spouses with different ideas of what to have for dinner. But has anyone examined how something that is such an intricate part of human nature is (or is not) accomplished? In this book, Harvard University psychologist Howard Gardner examines how an individual can get someone to change an opinion by learning what process is being used and why it does or does not work.

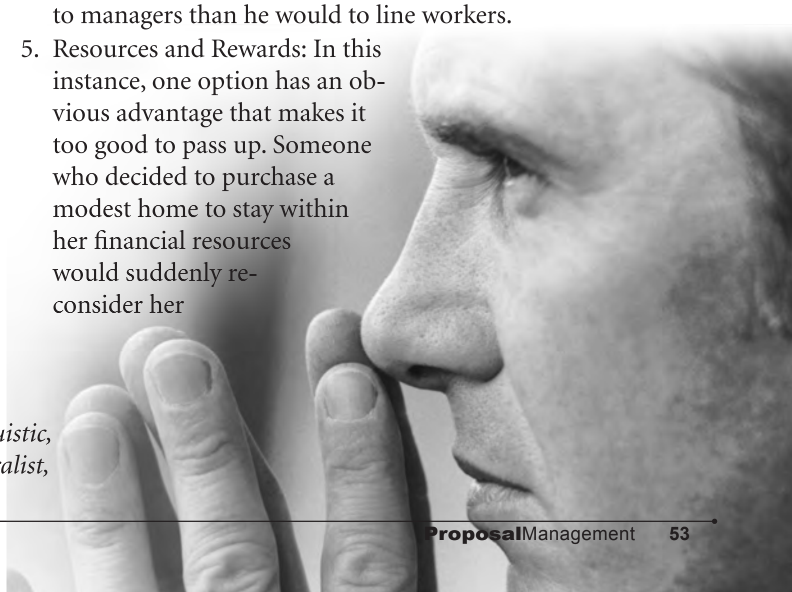
Gardner is known for putting forth the idea that people do not have a one-dimensional mind whose development can be measured by a standard IQ test. He proposes that people have "a multitude of intelligences"—such as linguistic, mathematical, musical, spatial, naturalist, and interpersonal. These multitudes of intelligences are independent of each other and develop at their own pace. For those who are not familiar with Gardner's original work in this area, *Changing Minds* contains a chapter explaining his concept of a multitude of intelligences. I found some of this information helpful since it provided an understanding of his research that led him to decide to decipher how minds are changed. However, I found some of this material tedious and thought it provided more detail than was necessary for the average reader to grasp the concept.

Taking his research one step further, the author applies his cognitive research to studying the process used to persuade people to adopt new ways of thinking about matters.



To this end, he proposed a list of seven "levers" as the tools that can be used to help change minds. These levers can be drawn upon in different combinations under different circumstances; however, these techniques also work in concert. These seven levers can be explained as follows:

1. Reason: Presenting logical facts in sequence such as Benjamin Franklin's habit of listing the pros and cons of a given situation to reach a decision.
2. Research: Presenting relevant data, an example of which would be gathering price information before making a purchase.
3. Resonance: An idea feels like a fit; in other words, the idea "feels right" to the audience.
4. Representational Redescriptions: A viewpoint becomes more convincing when it is presented it several different ways, each of which proves the same point. For example, an executive implementing a policy change would present the change differently to managers than he would to line workers.
5. Resources and Rewards: In this instance, one option has an obvious advantage that makes it too good to pass up. Someone who decided to purchase a modest home to stay within her financial resources would suddenly reconsider her



Man has multiple intelligences: linguistic, mathematical, musical, spatial, naturalist, and interpersonal.

choice in the face of a sudden multi-million dollar lottery win. Coercion can fit into this category; a parent who promises a child extra privileges to reward an improvement in grades could greatly influence that child's behavior.

6. Real-World Events: Wars, economic depressions, or natural disasters can cause people to change their views. Someone who moved to Florida upon retirement may well move out of the area after experiencing a hurricane.
7. Resistance: The greater the resistance, the harder it is to convince others to change their minds. It is difficult to convince someone who is a committed life-long Democrat that he should vote Republican. Therefore, it is important to keep resistance in mind. In the book, Gardner attributes an ability to overcome resistance as one reason why Thomas Jefferson and John Adams were able to put their different political views aside and resume their friendship during their later years.

To prove the usefulness of these seven levers, Gardner analyzes the behavior of several individuals, including President George W. Bush, Margaret Thatcher, Nelson Mandela, Mahatma Ghandi and Tony Blair. He uses these examples to describe events he has analyzed to determine how they are used. For example, he explains that during the 1980s Margaret Thatcher used resonance and real-world events to change the minds of the British people.

World leaders and others who have influenced governments are not the only examples used. Gardner believes that scientists and researchers, those involved in the arts, and teachers at all levels of education can change people's minds. He discusses how this goal is achieved by these "indirect leaders" through "scientific discoveries, scholarly breakthroughs, and artistic creations." He states, as an example, "More conceptions of the Spanish civil war were formed and altered by Pablo Picasso's *Guernica* and by the novels of Ernest Hemingway and Andre Malraux than by a thousand news dispatches." These indirect leaders use their theories, studies, or art to change minds, yet they also still employ the seven levers.

What I found interesting in his use of these examples is Gardner's scope. He begins by using a "big picture" example (Thatcher's ability to shift the thinking of the British people) and slowly narrows the view until he reaches the smallest element — an individual changing his or her mind, as happened in the case of the famous American communist spy, Whittaker Chambers.

There are ways Gardner's approach to changing other people's minds applies to what we do as proposal professionals. Before we can begin to use it to influence another's perspective, we must know our audience. Will a person be persuaded by research data, real-world events, or rewards? The same is true when writing a proposal; it is imperative that the vendor understands the customer (the audience) and those "hot buttons" (levers) that will influence the final decision. Is the customer open to the idea of changing vendors? If not, and the customer is convinced removing the incumbent is not in his best interest, then there are resistances that must be addressed and may, or may not, be resolved in the customer's mind. Applying Gardner's levers may not produce the desired result all the time, but the book provides additional insight into how business development and proposal professionals can market a proposal and influence the decision of the buyer.

World leaders frequently utilize the seven levers Gardner describes.

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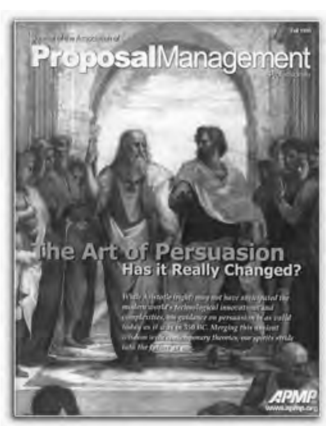

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Proposal Management, the Professional Journal of the Association of Proposal Management Professionals (APMP), publishes articles, research, and case studies about business development and proposal management.

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Proposal Management invites authors to submit their best research for peer review. Manuscripts may be of practical or scholarly importance to APMP's audience of proposal development, acquisition, procurement, business development, sales, and program management professionals.

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Proposal Management publishes the following types of peer-reviewed articles:

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- Original contributions to proposal-related theory.
- Case studies of solutions to proposal-related problems.
- Tutorials on proposal-related processes or procedures that respond to new laws, standards, requirements, techniques, or technologies.
- Reviews of proposal-related research, products, books, bibliographies, and bibliographic essays.
- Views and commentary.

The journal promotes APMP and its goals through the timely publication of articles, reviews, and references. The journal is a medium for promoting constructive, intelligent discussion and debate about business development acquisition and proposal management. Because the primary audience of the APMP professional journal is informed practitioners in the private, government, and nonprofit sectors, manuscripts reporting the results of research or proposing theories about topics should include descriptions of or suggestions for practical applications.

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- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format. Screenshots are preferred to be captured and output should be 6" (width) by 4.5"(height) for full screens.
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