Table of Contents

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CEO/COO Forum

by Tony Birch and Paul Taylor

We are both looking forward to seeing you at the 17th APMP Annual Conference (May 23-26, 2006) in New Orleans, LA. There is an exciting line-up of presentations and workshops—all centered around the conference theme of "**Lessons Learned from Lagniappe[1]: Proposing Extra Value to Gain and Keep Customers.**"

Attending a conference is not just about having a few days away from the office. Our Annual Conferences provide you with the opportunity to:

- Learn new skills and benefit from world-class expertise and best practices that can be applied in the workplace the day you return.
- Share and exchange ideas to help you keep pace with developments in proposal management.
- Network with your peers–develop, maintain, and enhance professional contacts.
- Think, absorb, and even invent solutions to your business problems.
- Make yourself aware of new and existing products, or newly available services, and help to establish relationships with vendors.

Whatever your reason for attending the Annual Conference, determine what you want to gain from the event. Are you looking to gain new knowledge in specific topic areas? Are you looking to gain as much new information as possible? Are you primarily attending to network with new people? Are you looking to find a new job? Maybe some or all of these reasons?

If you are going to attend:

- Plan a balance of sessions and other scheduled activities that suits your needs. In addition to attending sessions, for example, you may want to find extra time to visit with vendors at the exhibition area.
- Plan your travel days carefully. Arrange to arrive on Tuesday in time for evening registration, and to leave on Friday after the final presentations/workshops.
- Allow room in your luggage for the materials you collect during the conference.
- Bring lots of business cards, and don't be afraid to exchange cards with people you meet.
- Take every opportunity to talk with people–all sorts of people, including attendees, presenters, conference coordinators, exhibit vendors, and so on. In addition to networking, you can learn as much outside of conference sessions as you can in the sessions.
- Enjoy the host city New Orleans was selected as the site for the 2006 Annual Conference long before Hurricane Katrina devastated the Gulf Coast area. We are confident that New Orleans will be a wonderful venue for our 2006 conference for three reasons:

We are confident that New Orleans will be a wonderful venue for our 2006 conference.

- Katrina caused limited damage to the conference hotel and its immediate area (French Quarter)–there was little or no flooding in this area. To see the progress being made, please visit www.quartercrawl.com.
- Our Conference Organizer and Executive Director visited the venue at the end of December. They saw that recovery efforts are already well underway, and have been assured that this recovery will accelerate, and be successful, leading up to the conference.
- Conferences like ours, with large numbers of people attending, are critical in revitalizing this famous city. We are assured of the warmest of welcomes and hospitality.

We are going to be there and, along with the rest of the APMP Board, we want to support and help with the region's economic recovery.

[1] Lagniappe, pronounced "Lan–Yap," is a Creole (Louisiana French) word for providing the customer with a little extra benefit, unexpected and at no charge.

International Report

by Paul Taylor

Around the APMP World

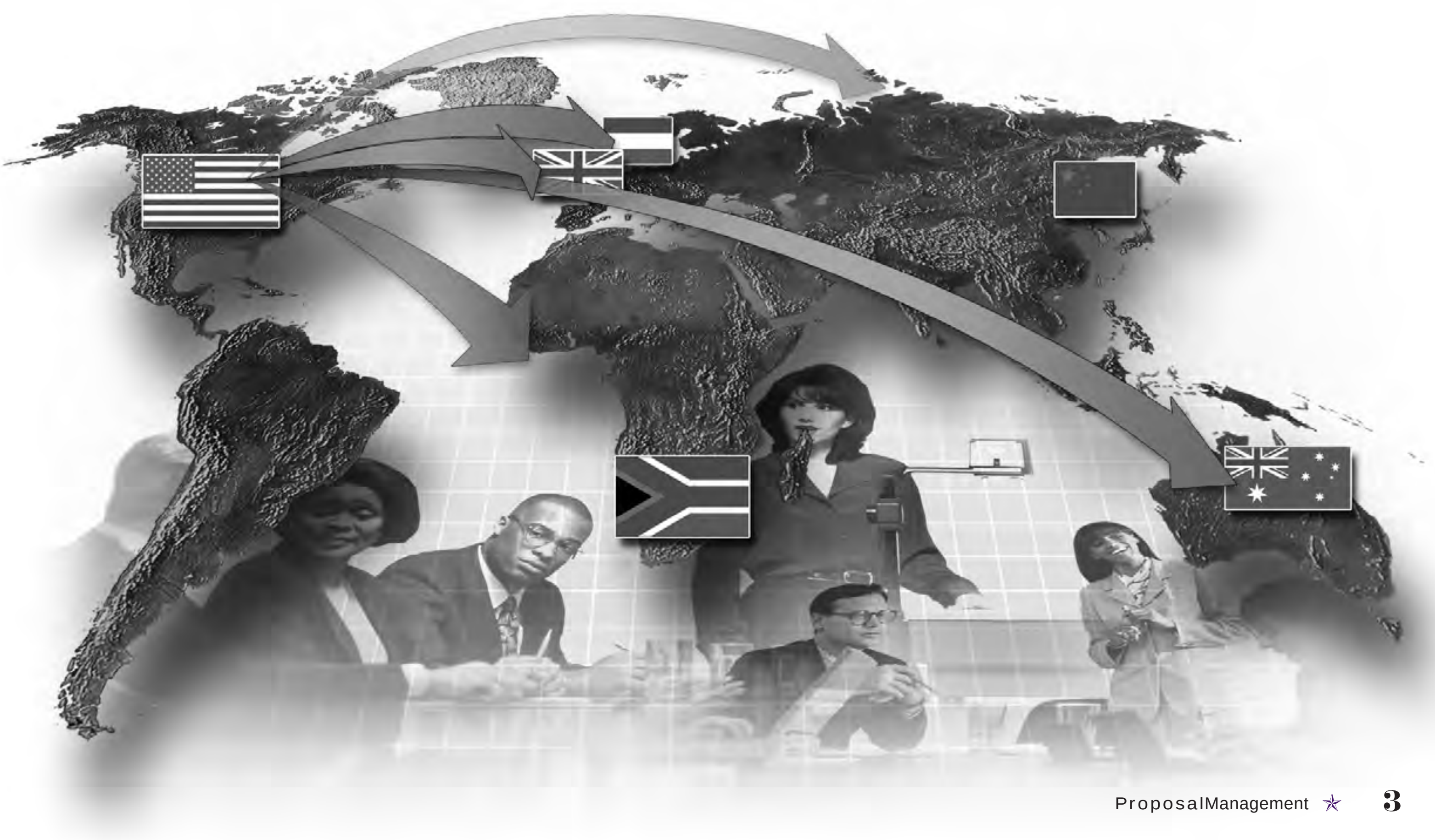
As the APMP continues to grow outside of the United States, I will keep the membership informed of activities "Around the APMP World."

THE NETHERLANDS—The last twelve months have been very exciting for the Dutch chapter. Established in 2004, they continue to increase their membership numbers, segments, and nationalities. Their first American (but Dutch speaking) colleagues have joined. Also, more and more people have hit on their website (http://www.apmp.nl/). The six meetings that they held last year varied from proposal writing and customer presentations to sharing best practice among members! A full programme has also been planned for 2006.

AUSTRALIA—Five people attended an initial meeting in Sydney in late 2005. Jon Williams (who was the first CEO of UK APMP) led the meeting and commented that "There seems to be considerable interest from proposal professionals across Australia." Following this meeting, a steering group was formed to move things forward. This was followed by a "kick off" event on February 21. The formal launch of the APMP Australia chapter is eagerly anticipated later this year. If you are based in Australia - or have colleagues there - do give this initiative your support.

SOUTH AFRICA and CHINA—Preliminary discussions are underway with local members to consider the viability of establishing local Chapters in both of these countries.

UNITED KINGDOM—following their immensely successful October 2005 Chapter Conference, which also played host to the APMP Board Meeting, the **UNITED KINGDOM** hapter Membership continues to grow rapidly. A full calendar of events is planned for 2006 and is listed on their website http://www.ukapmp.org/.



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

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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.

Proposal Management is published bi-annually by APMP. The APMP Professional Journal is printed in the USA. Claims for missing copies must be made within three months of publication date. Missing copies will be supplied as reserve stock permits.

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- Inside Front Cover: $1,800.00 (4 Color) *(Sold for both 2006 issues)*
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- Electronic copy—due March 1st (for Spring), or September 1st (for Fall).
- Final payment due to APMP—March 1st (for Spring), or September 1st (for Fall).

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Please visit the APMP Home Page at *www.apmp.org* for additional information about *The APMP Professional Journal,* including viewable PDF files of advertisements and articles.

Membership

APMP's mission is to advance the art, science, 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 Website, www.apmp.org. Send your completed membership form to: APMP, Attn: Membership Applications, 300 Smelter Ave. NE #1, PMB 383;, Great Falls, MT, 59404. (406) 788-9840, (406) 454-0090 fax.

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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.

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.

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If you would like to submit an article, begin by reading the Editorial Statement and Guidelines for Authors on the following pages. There you will find our general guidance on manuscript preparation, scope of content, style, and methodology for submission and review.

Guidelines for Authors

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.

Editorial Statement

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.

Content

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

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

The journal promotes APMP and its goals through the timely publication of articles, reviews, and references. 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.

Submissions

The following are requirements for articles/manuscripts submitted:

- Not more than 30 pages, including exhibits, printed on 8 1/2" by 11" paper.
- 12-point font and at least one-inch margins on all four sides.
- Double-spaced throughout, including references.
- Submit an electronic file of your article via e-mail or on a CD-ROM. Microsoft Word is the preferred electronic format; Corel WordPerfect, Rich Text Format (RTF), or ASCII file format are also acceptable. Alternatively, you may submit four hard copies of your article via regular mail.
- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format. Screenshots are preferred to be captured and output should be 6" (width) by 4.5" (height) for full screens.
- Submit your article to *Proposal Management*'s Managing Editor or the Chair of the Editorial Advisory Board. (General inquiries can be made to the APMP Executive Director at (949) 493-9398.)

Note: We also solicit guest commentators for contributions to Trends and Views.

Manuscript Preparation

The following guidelines should be followed in preparing manuscripts for submission:

- Provide the manuscript's title and name(s) of author(s) at the beginning of the paper.
- Provide an informative abstract labeled *Summary* of approximately 150 words.
- Use up to fourth levels headings.
- Place all exhibits in the text with a descriptive caption.
- Bibliographic references should be indicated in the text by the last name and year of publication in parenthesis [i.e., (Jones, 1978)]. At the end of the text, provide a complete list of works cited (labeled "References") using full names of the authors and their book.
- All citations in References should conform to standard academic practices.
- Conformance with *The Chicago Manual of Style*, 14th Edition, pp. 640-699, is preferred.
- At the end of the text file, include a biographical sketch labeled "Author(s)" of no more than 100 words for each author. Describe author's professional experience, education, institutional affiliation, professional organizations, and other relevant information. Include e-mail address and a telephone number where you can be reached during business hours.

Style

Proposal Management articles must be well-organized and readable. Write clearly and avoid jargon and acronyms. Use the active voice. Avoid language that might be construed as sexist, and write with the journal's international audience in mind.

Spelling and usage should conform to *The American Heritage Dictionary*, 4th edition and *The Associated Press* stylebook. Punctuation, format, and citation style should conform to *The Chicago Manual of Style*, 14th edition.

Review

Submissions, if they conform to the above specifications, will be reviewed by the Journal's Editorial Advisory Board in accordance with the Board's internal procedures for review. In general, an article will be evaluated in terms of the relevance of the topic, its potential contribution to our understanding of business development or proposal management, and its readability. When appropriate, the Board may provide the author with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Conflict of Interest

While journal staff and contributors to *Proposal Management* may benefit from the professional recognition they gain through this affiliation, they shall not use the journal as a forum to give inappropriate or unfair advantage to themselves or others. Journal staff members and contributors are permitted to purchase advertising in *Proposal Management* at standard, published rates.

Any staff members or contributors who believe they have a potential conflict of interest must immediately notify the Managing Editor of the journal, who will decide whether a potential or real conflict of interest exists. Based on the Managing Editor's decision, journal staff or contributors may be asked not to involve themselves on the subject of the conflict of interest.

Objectivity

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

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Annual Conference

by Chuck Keller and David Winton, Co-Chairs

The APMP Annual Conference Returns To New Orleans As Life Returns To The "Big Easy"

APMP returns to New Orleans for our 17th Annual Conference from May 23-26, 2006, at the Sheraton New Orleans Hotel. Much has happened to the "Big Easy" and the APMP since we held our first New Orleans conference in 2003–and what New Orleans has faced recently has been anything but easy.

Last August and September, New Orleans and the Gulf Coast were hammered by Hurricanes Katrina and Rita. While it may be debated whether New Orleans will ever be the same after these hurricanes, we know that it is recovering and strongly believe that it will again flourish as one of America's important and unique cities. Perhaps most importantly for APMP, we are confident that New Orleans will again prove to be a capable and accommodating host for our annual conference.

The theme celebrates the Creole culture of New Orleans, the city's revival and our goal to have conference presentations that help you propose benefits to prospective and current customers.

The hurricanes caused only minor damage to the Sheraton New Orleans Hotel on Canal Street and the surrounding areas of the French Quarter and Garden District. Our onsite visit to the Sheraton this past New Year's Eve confirmed that the Jackson Square and Bourbon Street areas were very much "alive." To monitor which businesses are open in the French Quarter, please go to www.quarter-crawl.com. The listings are updated weekly.

As New Orleans rebuilds, the APMP continues to grow and looks forward to helping the city's recovery with our conference business:

- Since May 2003–the month of our 2003 New Orleans conference–APMP membership has grown nearly 35% to about 2,000 members worldwide.
- Registrations for our annual conferences have increased 40% since the 2003 conference, which attracted 392 participants, to 547 attendees at last year's Conference in Phoenix.

Our 2006 Annual Conference theme is "Lessons Learned from Lagniappe: Proposing Extra Value to Gain and Keep Customers." Lagniappe, pronounced "lan-YAP," is a Creole (Louisiana French) word for providing the customer with a little extra benefit, unexpected, and at no charge. The theme celebrates the Creole culture of New Orleans–and we hope the city's revival. The theme also reflects our goal to have conference presentations that will help you better propose the benefits of your product/service to prospective and current customers.

The 2006 Annual Conference will provide the following lagniappe to attendees:

- Two featured speakers will speak at morning conference sessions: Mr. Martin Andelman, President, The 4th Floor LLC; and Dr. Tom Sant, founder of the Sant Corporation and an APMP Fellow. Both are book authors: Mr. Andelman wrote *RFP Nation*; Dr. Sant, wrote *Persuasive Business Proposals: Writing to Win Customers, Clients, and Contracts*, and the recently published *The Giants of Sales*.
- The conference program will offer more than 50 presentations–the most of any APMP Annual Conference. The majority of presentations will be 50

minutes long. However, there will be many extended presentations (either 80 minutes or 3 hours in length) to allow more in-depth coverage of selected proposal topics.

- There will be a diverse mix of proposal topics, with conference presentations ranging from novice to veteran proposal professionals, whether they develop proposals for government or commercial markets.
- For an additional fee, you can attend the Business Development Institute (BD-Institute) workshop about the use of the Business Development Capability Maturity Model (BD-CMM). This pre-conference workshop will be held on Tuesday, May 23. For more information about the BD-Institute and BD-CMM, please visit www.bd-institute.org.

The APMP is also a lagniappe source for conference attendees and the State of Louisiana. We have purchased 600 "Louisiana Lagniappe 22" bracelets from the Catch 22 for Blue Foundation, and each conference attendee will receive one of these bracelets. The Catch 22 for Blue Foundation is a non-profit organization founded by David Dellucci, a major league baseball player for the Philadelphia Phillies and Louisiana native. Bracelet proceeds will support Hurricane Katrina relief work in Louisiana. For more information about the Catch 22 for Blue Foundation, go to www.catch22forblue.org.

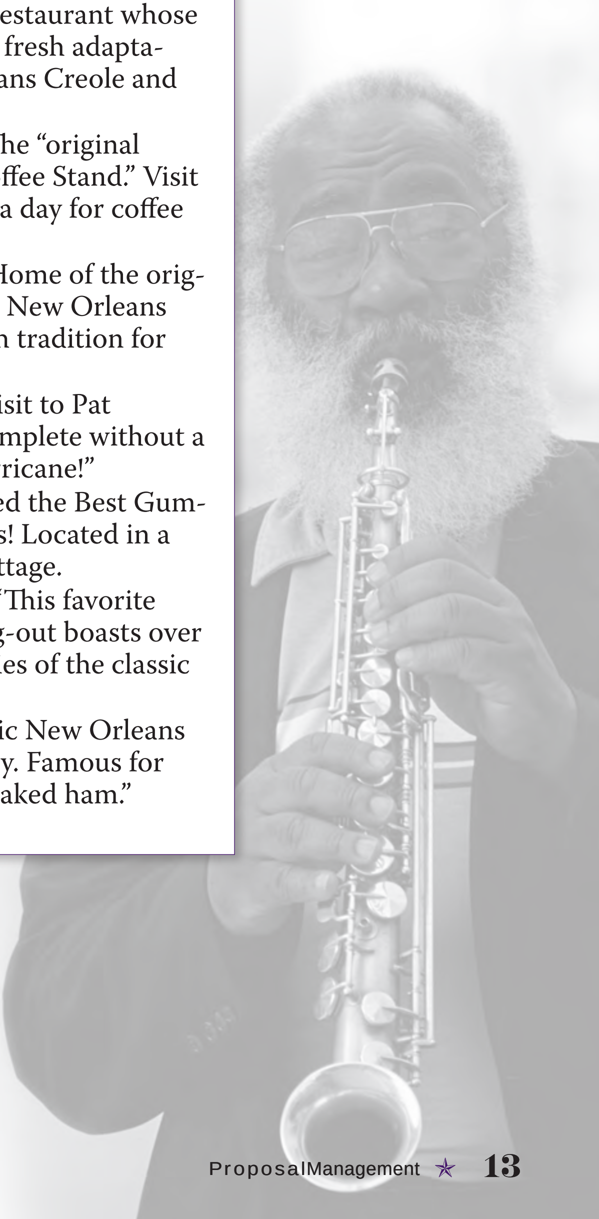
Lagniappe awaits you at our 17th Annual Conference–and so does the APMP and the City of New Orleans. We hope to see you there!

Things to Eat in New Orleans

New Orleans has just successfully hosted the 150th Mardi Gras and is busy preparing to host the 2006 APMP Conference!

In between presenters or after the day's activities, check out the following list of favorites submitted by the **Journal** *Staff:*

1. *Emeril Lagasse's NOLA Restaurant*. "Funky, informal restaurant whose menu features the fresh adaptations of New Orleans Creole and Acadian Cajun."
2. *Cafe Du Monde*. The "original French Market Coffee Stand." Visit the Cafe 24 hours a day for coffee and beignets.
3. *Central Grocery*. Home of the original muffaletta – a New Orleans original sandwhich tradition for over a 100 years.
4. *Pat O'Brien's*. "A visit to Pat O'Brien's is not complete without a world famous Hurricane!"
5. *Gumbo Shop*. Voted the Best Gumbo in New Orleans! Located in a charming 1724 cottage.
6. *Johnny's Po-Boys*. "This favorite New Orleans hang-out boasts over 45 different varieties of the classic po-boy!"
7. *Mother's*. Authentic New Orleans home style cookery. Famous for "the world's best baked ham."



Welcome

by John Elder

This issue of the *Journal of the Association of Proposal Management Professionals* serves as a prelude to the upcoming 17th Annual APMP Conference and Exhibits, scheduled for May 23-26 in New Orleans, Louisiana. No less than 10 contributors to this edition will be presenters in the Big Easy, a true indicator of the volunteerism that is a hallmark of our organization.

The men and women who regularly offer their time and resources to, as the Mission Statement of APMP says, "advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits," are to be congratulated for their continuing efforts. Whether it be service on the Board of Directors, contributions to the *Journal* or *Perspective*, involvement in Strategic Initiatives, presentations for the Annual Conference, or helping to make the local chapters viable marketplaces for the exchange of ideas and techniques, their efforts truly make APMP what it is today, and influence how it will continue to grow in the future.

Thanks to all who give of themselves, and see you at the Conference !

APMP Code of Ethics

Members of the APMP are expected to:

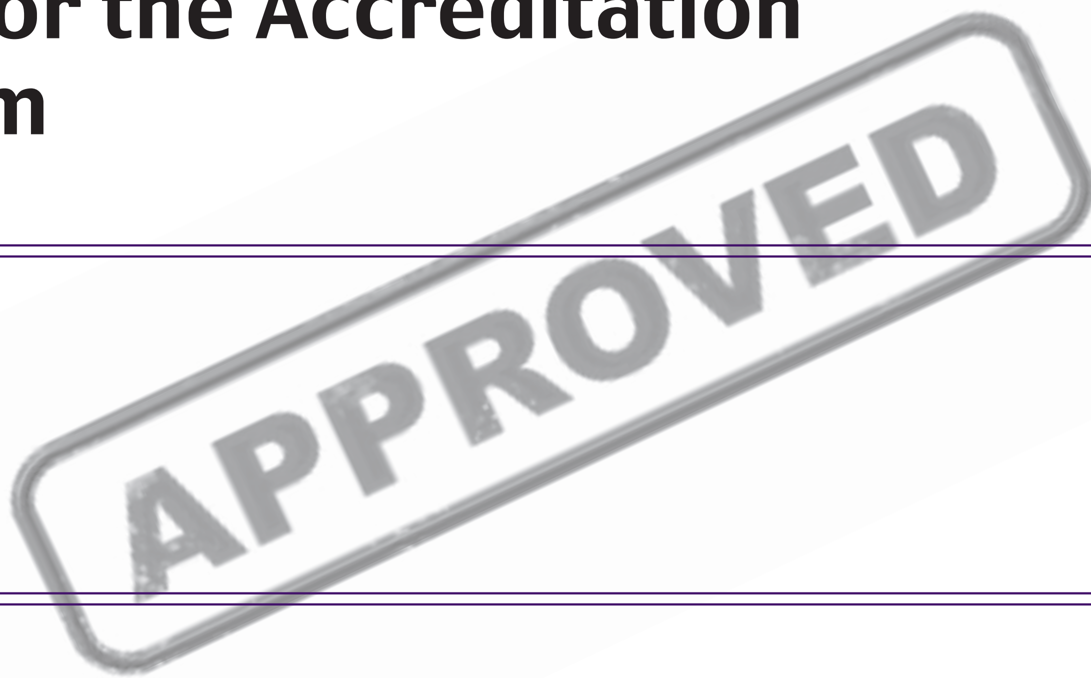
1. Comply with rules, government regulations, and laws in their respective countries, as well as other appropriate private and public regulatory agencies.
2. Ensure compliance with all rules concerning interaction with clients and Government liaisons.
3. Protect sensitive information and comply with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

“We believe that formal accreditation for Proposal Management is a major step in promoting the profession of Bid Management within the UK and around the world. We are delighted to be the first organisation in the UK to seek Approved Training Organisation status.

–Chris Weatherstone, CEO, WPM

APPROVED TRAINING ORGANIZATIONS: APMP Launches the First Approved Training Organizations (ATOs) for the Accreditation Program

by Cathy Day



The first ATOs are going through the approval process

Currently, there are more than 30 organizations around the world that have expressed an interest in becoming APMP ATOs. These include the traditional proposal training organizations and larger companies who wish to have their own internal training to enable their staff to achieve professional qualifications and recognition in the area of proposal management.

Using international assessment standards, organizations will be approved to deliver training for the Accreditation Program

All prospective ATOs will be administered and licensed on behalf of the APMP by the APM Group (APMG). APMG is already recognized internationally as an accreditation company. It has a proven track record and specializes in accrediting people, across a range of industries and management disciplines to internationally recognized standards.

Organizations go through a formal approval process

To be eligible to become an ATO, an organization must be assessed as having met, and is able to continue to meet, criteria that the APMP has defined to meet international standards. The diagram on the next page shows the steps involved to become an APMP ATO.

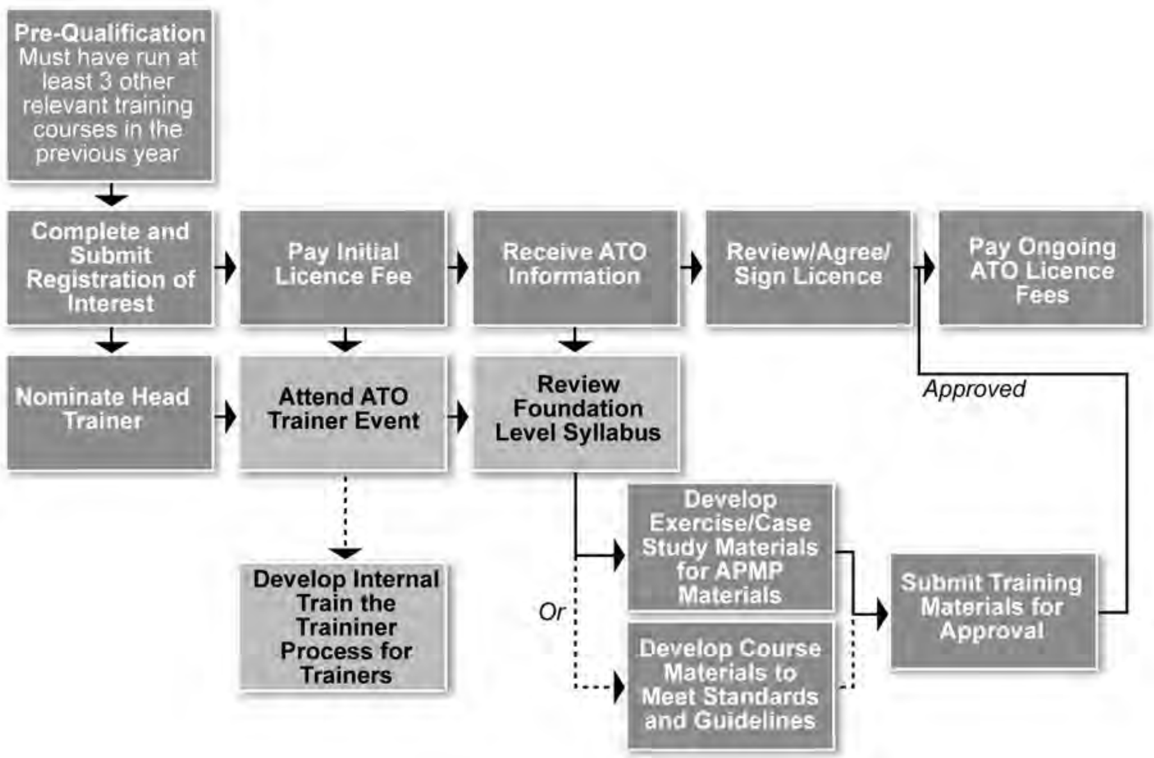
The APMP has developed outline training materials for the Foundation Examination. The materials have been designed to show the suggested level of detail that should be covered against each of the syllabus topics. All courses, whether developed using the APMP materials or newly developed, will be assessed by the APMP to ensure they meet the approved standards.

> *Shipley is pleased to be one of the first companies to be able to offer training to support APMP members in achieving the independent professional recognition they deserve.*
> **–Tony Birch, Managing Director, Shipley Ltd** *.*

ATOs will be able to offer in–depth courses for syllabus subjects

The APMP recognizes that ATOs may wish to offer extended, in-depth training courses, for individuals or groups, of APMP syllabus subjects for either Foundation or Practitioner Level accreditation. The content of these courses is unrestricted as long as the core syllabus subject and the competency area(s) are covered in adequate detail to provide candidates with one of the following:

- The knowledge required to pass the syllabus subject in the APMP-Foundation Level multiple-choice examination.
- Specific knowledge and skills through training to those required at APMP Practitioner Level and as defined in the Proposal Professional Accreditation Questionnaire (PPAQ) Standards and Guidelines.



Prospective ATO Activities: all prospective ATOs must go through an approval process to ensure high quality course delivery standards.

Working with ATOs will benefit organizations and individuals

The experience that the APMP has gained to date from delivering both coaching and training workshops has clearly shown that there are benefits of working with an ATO to support individuals through the accreditation program. People who have taken the examination following these sessions have told us that the experience helped both to remind them of what they needed to know and give them the confidence to actually go into the examination process.

The result of independent studies show that professionally accredited employees benefit their organizations

The Business Development Institute (BD-Institute) conducted an industry benchmarking study in conjunction with the APMP. The results of the study clearly show that organizations that employ "appropriately competent professionals" in proposal management roles tend to win significantly more business than those that do not.

APMP accreditation assesses the tangible impact made by individual proposal managers. Companies directly benefit from their employees being accredited by the APMP as the Accreditation Program has been designed to ensure that it:

- Encourages staff retention
- Supports competency-based recruitment and promotion of staff
- Supports organizational initiatives such as Investors in People (IIP)
- Identifies performers
- Improves performance.

Encourages Staff Retention

There was a time when staff stayed with the same company for the duration of their careers. However, research carried out by the UK Chartered Institute of Personnel

Development (CIPD), in 2004, suggests that the majority of people spend approximately three years in a position before looking to progress. The results of a survey carried out by CIPD, showed:

- 40% of employees valued career development opportunities when assessing new employers
- 55% of employees saw the ability to develop everyone's potential as something that a 'responsible' organization would be particularly good at
- 81% of employees agree that responsible organizations are more likely to be creative and innovative.

Supports Competency–Based Recruitment and Promotion of Staff

Human Resource professionals can use the APMP competency-based framework to help them:

- Externally – with attraction and recruitment
  - Provide the business with a higher profile when advertising for staff – attracts a higher caliber of staff.
  - Recruit the right people with the right level of skills for both the vacancy and the company.
- Internally – with development and retention of key individuals
  - Provide a framework for broad training and development programs.
  - Provide a framework by which professional development can be aligned with business requirements.

Supports Organizational Initiatives such as Investors in People (IIP)

Provision of career development has proved a valuable retention tool, enabling the creation of a matrix of careers across differing parts of an organization. This helps to keep talented staff members moving within the company, rather than losing them and their knowledge elsewhere.

Good professional development policies within companies also provide the most cost-effective means of providing training, particularly if carried out in partnership with recognized professional bodies and institutions. APMP accreditation highlights development opportunities, is flexible enough to complement development and succession planning, and supports employee retention.

Identifies Performers

Accreditation is one of the most important ways of promoting and recognizing a highly skilled workforce.

APMP accreditation assesses and identifies those Proposal Managers. who make significant contributions to their organizations. This independent assessment goes beyond the performance appraisal system. The APMP accreditation process also provides:

- Individuals will have the skills to react more readily to a changing profession.
- Staff will be more adaptable, adding value to diversification opportunities.
- Improved motivation and retention of employees by the provision of professional development opportunities by the employer.

The formal accreditation of proposal management professionals represents an exciting and significant milestone for individuals, the profession, and the APMP. As a proposal practitioner of more than 20+ years and someone who was involved very early on with the APMP, I have eagerly anticipated this important event. My associates and I look forward to receiving 'Approved Training Organization' status and to helping proposal professionals achieve accreditation.

–BJ Lownie, Charter APMP Member, Director, P3 Consulting Group

Shipley Associates is excited about the rollout of the APMP Accreditation Program. We feel it will take the Proposal Management practice area to a new level of recognition and proficiency. We feel privileged to be on the "cutting edge" of its emergence, and are totally committed to doing all we can to make it a tremendous success.
–Edward G. Alexander, Vice President, Federal Training/ Programs and Designated Head Trainer for Shipley Associates for the APMP Accreditation

Improves Performance

The benefits of professional development can be as great for the employer as they are for the individual. To achieve performance improvements it is vital that businesses play an active role in the development of their workforce.

With professional accreditation, a company can achieve greater recognition as a reputable employer with a business agenda for excellence.

The accreditation program supports companies in winning better business by:

- Helping to ensure that they have skilled and more efficient Proposal Managers
- Helping to "grow" a flexible and adaptable workforce across the business
- Providing a common set of "best practice" standards across the business for business acquisition
- Attracting high caliber staff to the benefits of a professional development program.

The APMP is the only independent, international organization promoting the professionalism of those involved in winning business through proposals

Professional accreditation enables organizations to achieve greater recognition for themselves as a reputable employer with a business agenda for excellence.

Just as you, as an employee, increase your productivity and value through professional development, your company can improve its marketability, efficiency, and profitability by supporting and nurturing its most valued asset – ***YOU.***

Most companies invest in the development of their staff, recognizing that this provides future benefits to the company. Through sponsoring you to achieve accreditation and supporting your training, coaching or mentoring requirements, your company will demonstrate to you, and other business professionals in your company, that it recognizes the proposals-related discipline as a profession. The company will be showing it is committed to investing in its people.

Professional accreditation provides formal recognition of your professional skills. You are recognized outside your organization and by your peers in the profession.

If your company will not invest in your future in this way, you should invest in your future yourself.

Cathy Day has been a freelance Bid Management Consultant and Trainer since 2000. As APMP Director for Accreditation, she is managing the ongoing development and rollout of the Accreditation Program to individuals and organizations throughout the USA, UK, and Europe. She can be contacted at cathy.day@b2binternational.co.uk.

To Bid or Not to Bid?

That is the Question!

by Jay Herther

I am sure Shakespeare never realized that his phrase would be morphed into one of the most critical business development and capture management questions of our time. Yet it is completely apt: "The major objective of the bid/no-bid process is to arrive at a rational, business-based consensus within your company to pursue or not pursue a given procurement opportunity" (Frey 2005).

The opportunity cost of pursuing the wrong Request for Proposals (RFP) can be very high. "The worst-case scenario is to commit significant resources and finish second" (Page 2002). Our goal is to provide a framework to develop a questionnaire decision support tool. We also describe a process to establish a Bid Board to make intelligent, fact-based bid/no bid decisions. Targeting the right opportunities while having the courage to "no bid" the others will help focus your precious people, time, and money resources and dramatically improve your win rate.

Dispelling the Myths about the Bid/No Bid Process

There are many myths surrounding the bid/no bid process. Our intent is to dispel these myths with some reality:

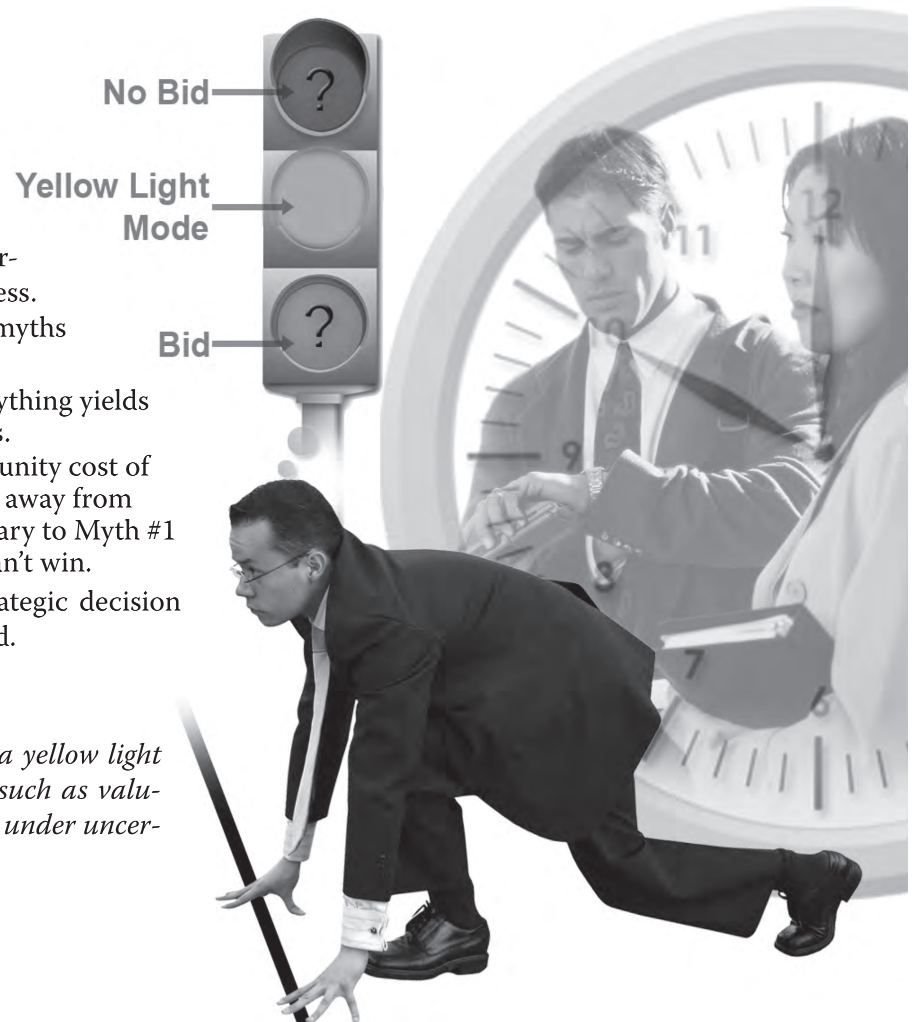
- **Myth #1** – Bidding everything yields more orders or contracts.
- **Reality #1** – The opportunity cost of pursuing bad RFPs takes away from winning others. A corollary to Myth #1 is If you don't bid, you can't win.

As such, each bid is a strategic decision that must be carefully weighed.

- **Myth #2** – We can make the bid/no bid decision later. We should take all the time needed to make a good bid/no bid decision.
- **Reality #2** – Indecision kills–most companies cannot convincingly say 'no' and lose valuable time in the bid/no-bid decision process. Decide within three business days of RFP release.

The sure way to lose is to operate in a yellow light – caution mode. This wastes resources, such as valuable proposal time and people operating under uncertainty. The light must turn either green – for bid to win, or red – stop because it is a no bid. A yellow cautionary position is the worst condition, since resources are being misapplied while the win probability is decreasing. Yet, many pursuits are in this "limbo zone" for far too long. Everyone wants to get more data before making a decision. During this time in limbo, you are tying up resources and the time meter is running.

As my father used to tell me, often by not making a decision you are making one.



The sure way to lose is to operate in a yellow light – caution mode. This wastes resources, such as valuable proposal time and people operating under uncertainty.

As my father used to tell me, often by not making a decision you are making one. In this case, fumbling around in a bid/no bid for weeks means that even if you decide to bid two to three weeks later, the competition already has a big lead. I advise that bid/no bids be made no later than three business days after RFP release. For key opportunities, the decision is a "go" long before the draft RFP is even released. "With a busy pipeline, veterans prefer to win or lose early" (Page 2002).

Another risk in this situation is the phenomena that James Beveridge called being a Drifter. "Management just drifts into a bid. It is ***too uncertain to make an all-out commitment and too insecure to stop***. It procrastinates and keeps the effort going on a shoestring. Finally, management traps itself into a bid because it can not walk away from its nickel and dime investment. Usually the proposal does not even make its way through the first gates of the evaluation process" (Beveridge 1982).

I'm not sure I'm going to put in the same level of effort on future proposals; they can find someone else to beat their head against the wall next time.
-White

- **Myth #3** – Have one bid/no bid meeting, decide, and never revisit the decision.
- **Reality #3** – Few things in life are absolute. Even though you should make your initial decision within three business days, do not be blind to important future developments.

The team needs to periodically re-visit and re-validate the bid/no bid decision. This is particularly true when there has been a major change—perhaps the customer's budget was slashed, a lead evaluator becomes a champion for a competitor, or the customer's answers to a set of questions or an amendment significantly changes the requirements and/or proposal evaluation criteria, past performance parameters, etc. Late changes are typically unlikely to turn a no bid into a bid, but more likely that a bid turns into a no bid situation.

- **Myth #4** – The sales or marketing person is closest to the customer and opportunity and should make all bid/no bid decisions.
- **Reality #4** – "Most sales people do not ask the tough qualifying questions because it can ruin a perfectly good forecast" (Page 2002). Bid/no bid decisions affect the entire company. In many cases, business people need to make this strategic decision for the company.

The irony is that what makes a salesperson good can also be destructive when they sell a no bid and wrongly convince the organization to bid. "Where is the line between a positive mental attitude and the rookie trait of over optimistic happy ears?" (Page 2002). The three-person rule is an effective evaluation technique to make balanced decisions. Solicit and integrate opinions from three non-biased people from other vantage points such as business, finance, or technical alignment.

Also, a Bid Board can be used for significant size opportunities facing a complex and difficult decision. The Board has a more objective/realistic viewpoint based on the data as it really is and not as you wish it was.

- **Myth #5** – The cost of bad bid decisions is only the bid and proposal (B&P) funds.
- **Reality #5** – Not making the right "no bid" decision consumes people, time, and B&P resources that could be applied to bidding and winning better opportunities.

Furthermore, "the consequences of writing a losing proposal that should have been a no bid go far beyond the lost proposal writing dollars. It can have a demoralizing impact on

The three-person rule is an effective evaluation technique to make balanced decisions.

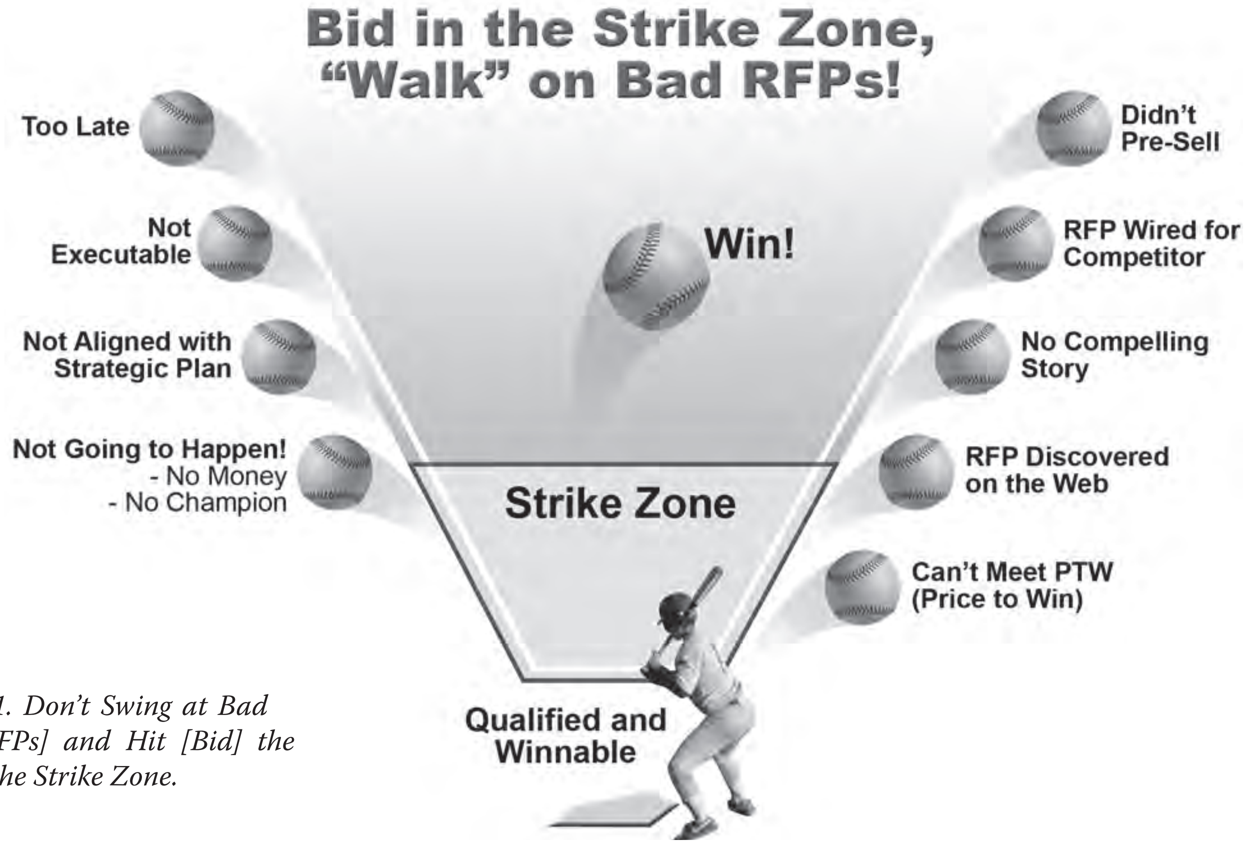


Figure 1. Don't Swing at Bad Pitches [RFPs] and Hit [Bid] the ones near the Strike Zone.

your employees. Particularly those employees who sacrificed nights and weekends on the proposal may question:

I worked all weekend, missed my kid's soccer game, for what?

I'm not sure I'm going to put in the same level of effort on future proposals; they can find someone else to beat their head against the wall next time" (White 2003).

Developing a Bid/No Bid Questionnaire

One industry leader described the situation: "We are not selective enough in the opportunities we bid. I have seen many examples over the past few months of our pouring significant hours into proposal efforts that had little or no chance of success. Apparently, it is next to impossible to have a no-bid recommendation withstand the pressure of sales wanting to bid, which means we are wasting additional time fighting internal battles. We need a fair, fast screening process that results in our pursuing smarter business."

In order to win major jobs, focus is critical. To gain focus requires intelligent bid/no bid decisions and "no bidding" some opportunities to increase the win rate. Using the baseball batting analogy, if you swing at every pitch your chances of getting a hit are reduced. Good hitters have an eye to swing at the pitches in the strike zone or at least near it. Swinging at those bad pitches (or long shot RFPs) will increase your number of strikeouts, and you will not be at the plate to hit that good pitch (win that proposal) that comes across the plate. Figure 1 illustrates some reasons that certain jobs/RFPs may be outside of your organization's strike zone and should be no bid.

Instead of getting enticed into bidding a real long shot, the organization is better served by positioning to win the next opportunity. Go meet with the next customer. Go influence the spec ahead of the RFP release. Go put together a demo to show the customer/evaluators. Get prepared for the next one. Start a blitz of future visits to customers who will be releasing an RFP. Get ahead of the next opportunity.

Instead of getting enticed into bidding a real long shot, the organization is better served by positioning to win the next opportunity.

To focus on everything really means to focus on nothing, so pick the proposals to submit carefully. The goal is to match the RIGHT resources to be focused on the RIGHT targeted opportunities at the RIGHT time. Real strategy is not deciding what to bid, but rather deciding what not to bid. This is particularly important in an opportunity rich environment. There is a strong tendency to bid everything at a mediocre level and win too few.

The five basic qualification criteria for deciding whether to bid or no bid depend on the match or alignment between your organization's position and the opportunity. These qualification criteria are typically: (1) solution match, (2) customer relationship, (3) competitive position, (4) executable and financial match, and (5) strategic value. The bid/no bid decision is a puzzle made up of these pieces. The Smart Opportunity Selection (S.O.S.) tool is the way to solve the puzzle.

Here are some basic questions to qualify the opportunity that is, in effect, to build a compelling business case for pursuing or not pursuing the bid. They are organized based on the five qualification criteria. Every business unit is unique and you can use some of these questions to develop a bid/no bid questionnaire tailored to your organization:

Solution Match

- Does the opportunity align with our core competencies?
- Do we have a technology, solution, service, product, and schedule match to the specification, and Statement of Work or Performance Work Statement?

Customer Relationship

- Do we have a positive relationship with the customer stakeholders or did the RFP/Request for Services (RFS) come in unexpectedly?
  - Going out to dinner once with the customer is NOT a relationship.
- Do we know the "story" behind the procurement?
- Avoid blind bids! Do you really think you have a chance of winning when you suddenly discover an opportunity online at Federal Business Opportunities (FedBizOpps - http://www.fedbizopps.gov/)? The chances are slim. As Richard White states, "behind every procurement there is a story. Someone has been involved and there is a story. If you don't know the story – don't bid."
- Are we positioned to win? How many times have we met with the customer, the decision makers, or the outside consultant (if they will be involved in the evaluation)?
- Do we know who wrote the RFP?
- Do we know the customer's "Hopes, Fears, and Biases" (Beveridge 1982)?
- Is there a major disconnect with the customer? "If you believe the customer is wrong, and you can't change his thinking, no bidding is the best thing you can do" (Beveridge 1982).
- Do we have a customer champion?

Competitive Position

- Does the RFP/RFS appear to be slanted toward a competitor? (Sant 2004)
- Do we have a unique or comparative advantage (significant win discriminators)?
- Do we have a compelling story?

Figure 2. Put the pieces together to solve the Bid/No Bid Puzzle.

- Are the evaluation criteria subjective or do they include detailed objective point scoring? Are the criteria fair, biased toward our solution, or slanted toward the competition?
- Have we helped shape a buyer's expression of his needs in the RFP?
- Did we pre-sell?
- Are we the incumbent? If not, does the customer have significant problems with the existing contractor?
- Do we have a cost/price or best value advantage?
- Are there high barriers to entry and a limited number of qualified bidders?

Executable and Financial Match

- Can we bid to win and execute?
- Are the terms and conditions too onerous and risky?
- Does the customer have a sufficient budget?
- Does winning at the required price-to-win (PTW) meet the organization's financial goals?
- Is this job a major stretch for our capabilities or resources?
- Do we have the relevant past performance qualifications/experience and testimonials?
- Do we have the key personnel on staff?
- Is the need real and will the customer really buy anything? Is the client serious about making a decision or is this more of an exercise in information gathering (Sant 2004)? The first key qualifying question for anyone should be, "Will this business happen for anyone at all? Experience has shown that many evaluations end with no buying activity whatsoever" (Page 2002). Will the customer actually award a contract to someone and not take an alternate choice outside of the RFP boundaries. The classic example is when a company issues an RFP and evaluates bids, then later makes the make/buy decision to make internally or perform the service themselves and never awards a contract.

In companies, the pendulum can often swing from bid anything and everything to an overly restrictive filter that results in bidding too few opportunities.

Strategic Value

- Does the opportunity align with the goals and objectives documented and articulated in our company's strategic plan?
  - Is it compatible with our target market?
- Would winning this opportunity be particularly damaging to our competitors (Sant 2004)?
- Is this client likely to be a strong partner or reference account in the future (Sant 2004)?
- Will this help us enter a new market?

S.O.S. = Smart Opportunity Selection Tool

S.O.S. is a tool that your organization can build using a simple one-page spreadsheet. It is unique to your company, and you will need to construct, or tailor, the questions. You will also need to assign weighting factors.

An example of an S.O.S. tool using the five qualification categories and some of their key questions is shown in Figure 3.

A few cautions and some advice when using such a tool:

1. S.O.S., as the name implies, is the equivalent of a Morse code call for help in making a good decision. It is a decision support aid to HELP; it is not a decision-making tool.
2. The goal is to enter objective data as it really is, rather than how you would like it to be.
3. Don't get locked into absolute category numbers or the total S.O.S. score. As Einstein said, "the purpose of modeling is insight, not numbers." There is no magic score that says it is a definite bid or no bid – but it is more important to track changes over time. The relative score is more important than the absolute for ranking/prioritizing opportunities.

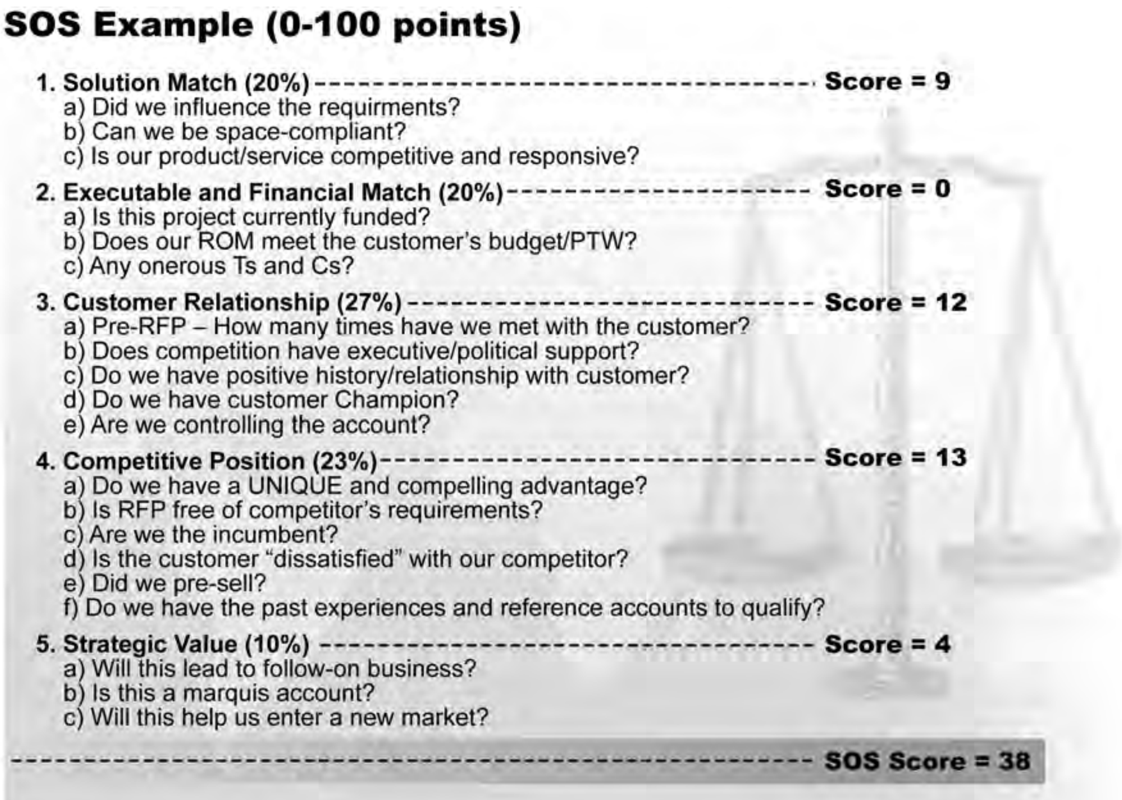


Figure 3. The S.O.S is easy to develop using the Bid/No Bid Criteria.

4. Validate the tool with some wins and losses by going back to the RFP release and synthesizing the score values. You will likely be able to refine and calibrate the tool by adjusting the weighting factors.
5. Complete the S.O.S. at various stages in the pre-RFP capture process and track the trend whether the score is increasing or decreasing. Score at the RFP release and review the results at the bid/no bid meeting.

Using a Bid Board

In companies, the pendulum can often swing from bid anything and everything to an overly restrictive filter that results in bidding too few opportunities. An excellent approach is to develop a strategic filter as an overarching guidepost to decide whether or not to bid/no bid opportunities. This strategic filter should be your strategic plan. Place more emphasis by bidding on opportunities that meet the strategic profile and less emphasis on opportunities that do not (Robert 1998).

When is a Bid Board Necessary?

In most cases, bid/no bid decisions are fairly obvious. At one end of the decision spectrum is a mismatch or an obvious no bid if it is wired for a competitor. At the other extreme can be a clear bid decision when you have worked closely with the customer pre-RFP and the specification is well aligned with your core competencies. Between these extremes are yellow and gray zones that need unbiased intelligence to make the right decision for your organization (see Figure 4).

In the yellow zone areas, management should generally trust experienced program managers to make good bid/no bid decisions. In this area, the three-person rule is also often effective where sales, engineering and a program manager discuss and debate to make a good decision. A Bid Board is necessary only to decide in the gray zone and is not to be over-used because it could become too bureaucratic. It is useful to arbitrate tough decisions.

To achieve a balanced perspective, a Bid Board is an effective vehicle to make effective fact-based bid/no bid decisions.

The purpose of a Bid Board is to:

- Maximize efficiency of fixed or scarce resources
- Increase the win percentage, and, more importantly, overall new business orders/contracts
- Identify patterns and adjust resource

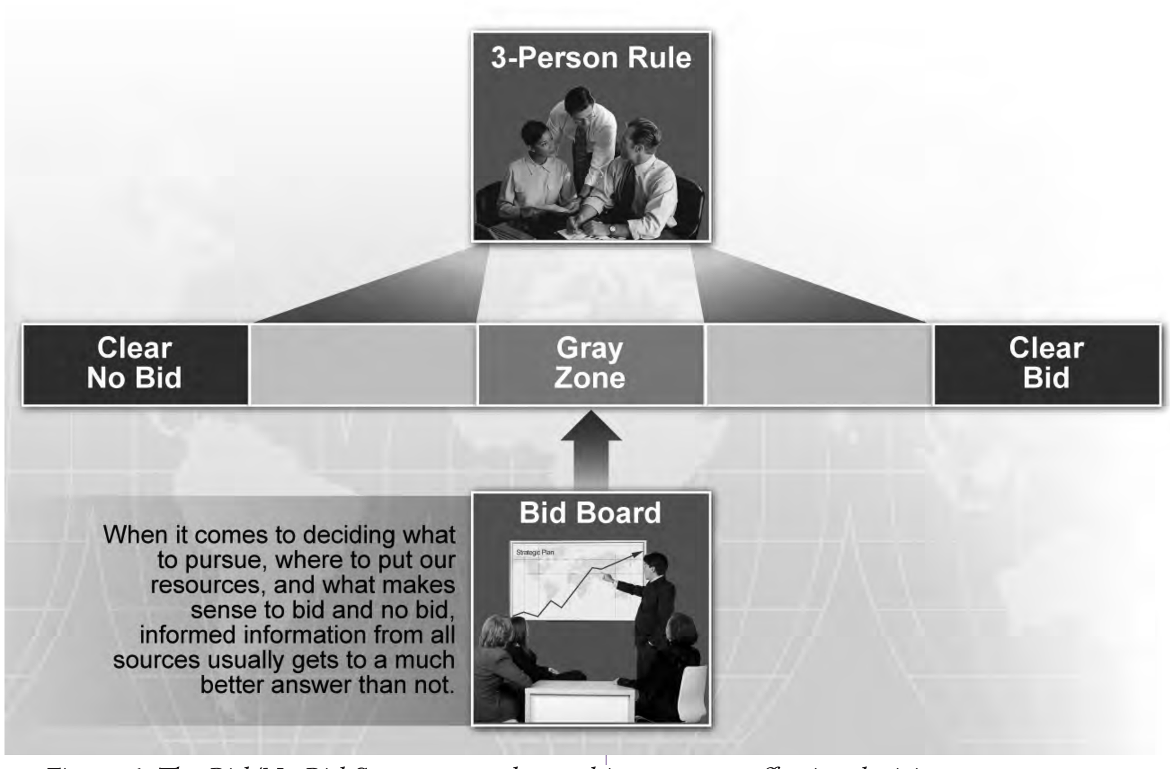


Figure 4. The Bid/No Bid Spectrum – the goal is to use an effective decision process to move from yellow to a Green (Bid) or Red (No Bid) State. Gray Zone decisions may require a Bid Board.

allocation across regions, markets, departments, and product lines/service areas to maximize orders/profit.

A Bid Board is also needed if the organization has an inherent bias in its bid/no bid decisions. Some organizations can be biased at the extremes. For example, one company no bid far too many opportunities. A strong champion was required to fight relentlessly to have the business allocate B&P and resources to bid. Even then, a no bid decision was a highly likely outcome. Ironically, when orders were down and the follow-on general manager took over, he was the exact opposite. He wanted to bid everything and only convened the Bid Board to vehemently challenge why we were "no bidding." Neither extreme is effective.

Indiscriminately bidding all opportunities has a high opportunity cost and takes precious resources away from winning strategic and larger opportunities. Bidding seven contracts and diluting limited fixed resources could result in a 1 out of 7 win rate. On the other hand, using selective neglect to no bid two unqualified/unwinnable jobs and bid the other five with focus and intensity could result in winning 3 out of 5. In the case of bidding all seven, you are leaving it to chance as to which proposals get understaffed and ill-prepared.

Some in the sales organization may resist and try to circumvent the Bid Board. However, the key question is, if there is not a strong enough "pro-bid" argument to generate several hours of debate with the Bid Board, then WHY should hundreds/thousands of person hours be blindly invested to bid such an opportunity? As Jim Beveridge stated, "If your leader can't convince their naturally biased management why you should win, they aren't going to do too well with the customer!"

In some markets where the proposal process is extended with rebids and final proposal revisions, this decision is even more critical. So, if the decision affects a longer and longer proposal process, your B&P resources and opportunity costs will be even more consumed by a bad decision. Many lessons learned from lost proposals reveal that the no bid red flags were blantantly apparent and ignored at the time of RFP/RFS release.

In addition, at a macro level, the Bid Board could re-direct that resources be assigned in a particular area that is opportunity rich and has a high contract closure rate.

Some of the specifics on implementing a Bid Board are:

- **When**—Within three business days after final RFP release.
- **How**—Use a short 1-page bid/no bid questionnaire/S.O.S. as a decision support tool.
- **Who**—Establish a Bid Board of objective business people with P&L responsibility.

The Bid Board membership should be multi-functional:

- Vice President of Sales, Director of Engineering, General Manager Chairperson. In a small company the Bid Board may just be the head of Sales and the President.
- It should be an odd number and the General Manager must always have the final decision.

Summary

If you use the concepts and tools in this article, you can avoid a dreaded customer debriefing quote, "Sure, I'll tell you why you lost, if you tell me why you bid!"

To summarize some of the key bid/no bid principles:

- Avoid blind bids! Have you positioned to win and addressed the customer's hopes, fears, and biases (Beveridge 1982)?
- Bidding losers wastes resources and demoralizes the team.
- By definition, you can't focus on everything! Focus your energy and critical resources on qualified and winnable opportunities.
- Develop and use a common yardstick S.O.S. tool as a decision aid, not a decision maker.
- Most bid/no bid decisions can be made by a business person or the right three people; however, some complex and significant decisions may require a Bid Board.

Knowing how to make intelligent bid/no bid decisions will take you and your organization away from the loss scenario and propel your organization into the winner's circle!

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This is fake text. If this were real text there would be something to read. Have a wonderful day. In fact, the other day real text was in this location. It was not important data. This is fake text. If this were real text there would be something to read. Have a wonderful day. This is fake text. If this were real text there would be something to read. Have a wonderful day. In fact, the other day real text was in this location. It was not important data. This is fake text. If this were real text there would be something to read. Have a wonderful day.
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Country 1: 21,584 Initial
12,401 After Inital Contact
Country 2: 48,481 Initial
23,584 After Inital Contact
32,003 Initial
10,876 After Inital Contact
7,914 Initial
5,679 After Inital Contact

It's Easy to Understand what You are Proposing:

Simplifying Life for Evaluators

In examining your proposal, the evaluator must quickly find the relevant information, decide whether you comply with the solicitation requirements, assess the technical merits of your solution, and rank your proposal against others. A well-prepared proposal can make the evaluators' job easier and help them recognize the merits of your solution.

by David C. Kumpf

The Challenge

When an evaluator opens your technical proposal, it is not with the same degree of anticipation that she might approach *The Da Vinci Code* (Brown 2003) or a favorite periodical. Instead, it is simply a job – the evaluator must read this document and make several decisions about it. She must take three steps:

1. Find the information she has been asked to evaluate.
2. Read and comprehend that information.
3. Decide whether the information provided indicates that your company meets the requirements set forth in the Request for Proposal (RFP), often by assigning points or ratings.

How will the evaluator decide to assign points or ratings? It is easy for the evaluator to look at a quantity in your proposal and compare it directly with a requirement in the solicitation – "yes, the proposed flow rate is greater than the minimum requirement, so this offeror gets points for that requirement." This sort of evaluation is directed by the evaluation method. (See, for example, the *Proposal Evaluation Guide* [TRICARE Management Activity 2005], the *Handbook on Evaluating Proposals for Health and Human Services* [Smith and Higa 2005], or the *Proposal Evaluation Tailoring Guide* [California HHS Agency Data Center 2004].)

Much of a proposal is about issues that are subjective – the experience of a management team, the effectiveness of a particular software development approach, the aesthetics of a building to be created.

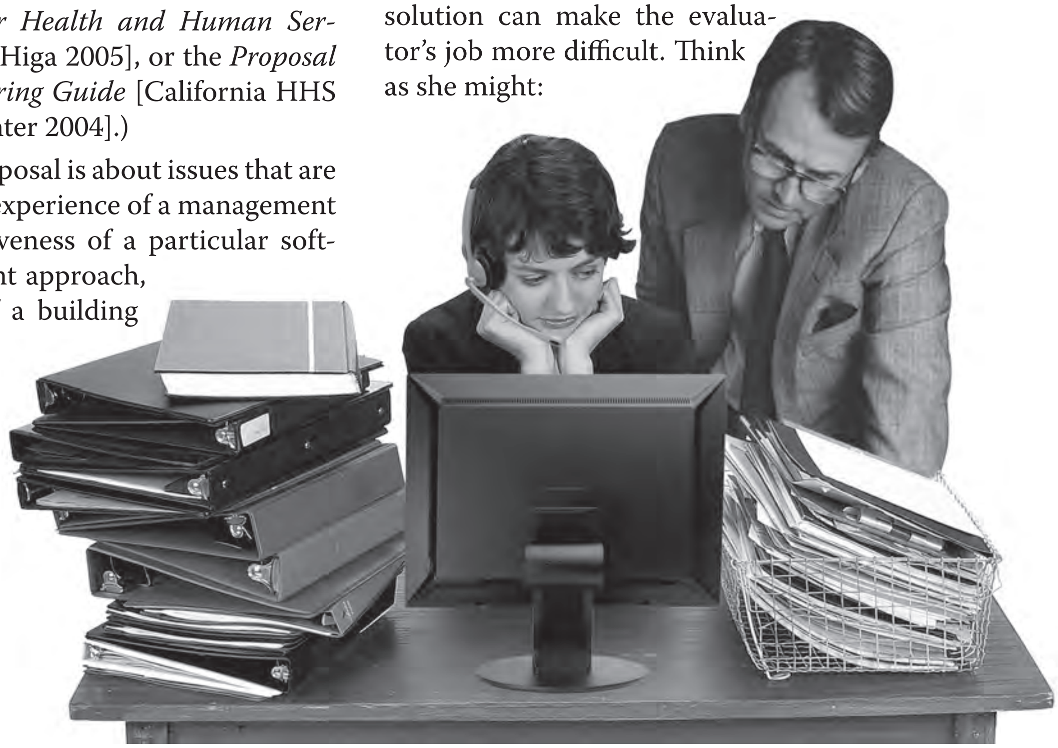
In those "first two seconds" the evaluator applies his or her experience and knowledge to decide whether your solution is appropriate and better or worse than another.

Consider that:

- Your proposal is probably one of many that she has to review.
- She most likely has a day job that includes many other things besides proposal evaluation.
- She may be distracted during evaluation by phone calls, emails, meetings, and questions from other evaluators.

Jayme Sokolow's article in the Spring/Summer 2004 edition of *Proposal Management* (Sokolow 2004) uses evidence from studies in the field of cognitive heuristics – in essence, a set of rules of thumb for rapid decision-making – to show different approaches evaluators may use to choose one proposal (or feature) over another. The recent book, *Blink* (Gladwell 2005), argues that we need to assign much more importance to such heuristics – "those first two seconds." In those seconds, the evaluator applies his or her experience and knowledge of the requirements to decide whether your solution is appropriate and better or worse than another – the third of the three steps the evaluator must take.

But what about those first two steps: finding the information, and reading and comprehending that information? Failing to plan for appropriate design and presentation of the solution can make the evaluator's job more difficult. Think as she might:



- "Where is the flow rate? Why can't they just put it in a specifications table?"
- "They mentioned something about management qualifications in this paragraph – where's the rest of the supporting information?"
- "Well, I read that paragraph twice, and still don't understand it. I think the bidder really does not have a solution for that problem."

By incorporating two key rules into your proposal development approach, you can avoid these problems. The rules are simple:

1. Simplify accessibility.
2. Clarify meaning.

In the remainder of this article, we will show ways in which you can implement these rules to simplify the evaluator's job and achieve better outcomes for your proposals.

Rule 1 – Simplify Accessibility

To simplify accessibility, you must make it easy and fast for the evaluator to find the answer to her questions. David Herndon, in an article in the Fall 2001 issue of *Proposal Management*, suggests that evaluation points vary directly with the evaluators' ability to find the answers to their questions (Herndon 2001). Retrievability of information has been identified by various technical communication studies as a key quality characteristic of a document (Corbin et al. 2002, and Hargis et al. 1998). And usability work in task-oriented applications has shown that the typical user will spend no more than five minutes to find the solution to his problem – and this work was done years before the World Wide Web and the concept of "Internet time." Readers expect answers *right now.*

By actively working on the design of your proposal, you can guide the evaluator directly to the information she needs.

By actively working on the design of your proposal, making good choices for physical packaging, and using specific access tools effectively, you can guide the evaluator directly to the information she needs.

Actively Design the Document

Create a Logical Structural Design. It is common for those working on a proposal (or any other large, formal document) to treat document design simply as "what it looks like." While you need to address visual design concerns, you must first answer the following questions:

- What information does the evaluator need to effectively learn about and evaluate our solution?
- How should we structure the presentation of information (independent of the actual information itself)?

While a complete discussion of this topic – the province of the field of information design – is beyond the scope of this article, you can take particular steps to better define the logical structure of your proposal. It is independent of the outline itself, and it has more to do with how you will organize information generally throughout the proposal. Once you do the work for a particular proposal, you will find that it applies to most proposals of the same type and scope. Because of the time required, though, this is best done when you are not in the middle of a proposal response – instead, develop the design after you complete one proposal, and use it for the next. That way, you will be able to incorporate the lessons you learn from one effort into future work.

The high-level steps are as follows:

1. **Define the information access needs of your audience, in writing**. How will they typically read your proposal? Will they break it into components? Will they read through it cover-to-cover, or simply flip through it looking for specific answers to particular requirements? What is the background of the evaluators? How much time will they spend on evaluating a given piece of the proposal?
   You don't need perfect answers for all of these questions, but you do need to have some answer. Capture what you know, and fine-tune it later.

2. **Define the logical elements you will need to satisfy the evaluator's needs.** Will you have volumes, sections, modules, paragraphs, lists (bulleted and numbered), tables, pull quotes, equations, graphics, RFP reference numbers, RFP text? Will sections be numbered or not? What numbering schemes will you use? Will different evaluators want different types of information elements? For example, technical users may want sequence diagrams, flow charts, GANTT charts, schematics, and so on, while administrative and management users may want bar graphs, pie charts, and concept diagrams.
3. **Define the meanings of each logical element.** What kinds of information should be presented in section headings, and how should they be worded, for example, with noun phrases, gerund phrases, etc.? What kinds of information should be in bullet lists?
4. **Define the structure and rules for the logical elements.** What is the maximum number of sections in a volume? The minimum number? What about subsections? (A common rule, for example, is to require that if you use a subsection within a section, you must use at least two. Otherwise, what was the purpose of having the subsection in the first place?) Will you allow bullet lists within tables?

See Schriver (1997) for an "inventory" approach to design. This approach creates a list, or inventory, of the textual elements that you will use to convey the message and then defines the visual formatting characteristics of each element. Texts on the Standard Generalized Markup Language (SGML) and eXtensible Markup Language (XML) tend to focus more on the syntactic relationships between elements; e.g. precisely defining the rules in step (4) above. See, for example, *The SGML Handbook* (Goldfarb 1991) or *Charles F. Goldfarb's XML Handbook* (Goldfarb and Prescod 2003).

Match the order of response items to the order of the corresponding requirements in the RFP.

Once you identify the logical relationships between document elements, you can arrange the elements in order and hierarchy to create the outline. Here, it is important to match the order of response items to the order of the corresponding requirements in the RFP. Doing so ensures that the evaluator, who likely is already quite familiar with the organization of the RFP, will quickly find the discussion of your solution to a particular requirement.

Create an Engaging Visual Design. Now that you have logical rules for proposal structure, you can worry about the format. This may change from proposal to proposal – while the notion of volumes, sections, and bullet lists remains constant, each customer may have different rules for proposal submission. Federal and state RFPs usually contain specific rules for minimum font size, margin width, page size, and so on. Generally, you should work with a graphic designer who has expertise in book design. Armed with the solicitation rules and the structural design, the designer can create a template and specifications that you can use to create an attractive and easy-to-read proposal. Some considerations for the design include:

- **White space**. Research studies in document design have established the need for the *judicious* use of white space to separate page elements so the reader can apprehend each one without distraction from others (Schriver 1997). But, the increasing specification of page limits for proposals jeopardizes use of white space. In the end, you will need to make a trade-off – should I continue to edit the text, or sacrifice the white space? (Usually, the right answer is the former, but it's hard to do when the books must go on the plane this afternoon!)
- **Type Faces**. There are myriad type faces available. It is usually best to limit yourself to a couple of major families with minimal variations within that family. If you ship documents in elec-

tronic format, remember that not all evaluators will have the same fonts on their system. You will need to send Adobe Acrobat files, or deliver the fonts with the documents (paying attention to copyright restrictions), or save the fonts with the files (allowed by Microsoft Word, for example). Pay special attention to font readability – there are several typefaces that are aesthetically beautiful, but have little impact for the reader and are harder to read. See *Stop Stealing Sheep* (Spiekermann and Ginger 1993) for additional guidance on choice of type faces. *Dynamics in Document Design* (Schriver 1997) contains a full section on the intelligent use of type in document design, including research results on the effects of typefaces in the context of different document types.

- **Facing pages**. If the RFP allows you to print pages double-sided (duplex), do it. Sometimes it is required. More important, it offers you significant advantages in making the document easier to use. First, the document is less physically imposing – it appears shorter, because there are fewer pages, and it is lighter. Second, you will need fewer or smaller binders. Third, you can exploit the advantages of facing pages – show a figure or table on one page, and the associated text on the opposite facing page. This takes a bit of work throughout the proposal development process, because you cannot just format it during production. However, it is easier to use – the evaluator can look at the facing pages and grasp the complete concept at once.
- **Access elements**. Pay special attention to formatting of access elements that direct the evaluator to each section, topic, or piece of information. Be sure that each level of heading that you use is clearly distinguishable from other levels. If you have RFP reference numbers corresponding to specific pieces of text, you might consider putting them in the page margin or in a special "scan column" to make them easy to find. Include appropriate information in the running headers and footers – not only page numbers, but solicitation name and number, bidder information, and so on.

Incorporate the use of illustrations as part of your overall design. Effective figures and tables can simplify complex concepts, reduce page count, and increase the emotional impact of your proposal.

- **Graphic Elements**. Incorporate the use of illustrations as part of your overall design. *Effective* figures and tables can simplify complex concepts, reduce page count, and increase the emotional impact of your proposal. A well-designed picture can show the evaluator how different strategic elements combine to deliver a particular product or function, and show it in a way that makes it seem exciting and interesting. That picture might even replace several paragraphs of text – providing a respite from page after page of dense type. And a good table can quickly show associative relationships between many text or numeric elements.

Ensure that your illustrations use consistent colors and visual style – and avoid the clip art libraries from most illustration soft-

ware, as this often makes the results look amateur. Also, ensure that the type size in illustrations will be legible to the evaluator – this usually means 8-point or larger type. Format tables consistently, using similar shading and ruling line conventions. For both figures and tables, remember that shading any areas that will have text can create difficulty in reading the text.

Consider Physical Packaging

The packaging of your proposal can be considered akin to a *wayfinding* problem on a small scale. What is wayfinding? Patrick Gallagher says:

> Wayfinding exists in many scales and environments… [It] is essentially a succession of clues comprising visual, audible and tactile elements… Good wayfinding helps users experience an environment in a positive way and facilitates getting from point A to point B. When executed successfully, the system can reassure users and create a welcoming environment, as well as answer questions before users even ask them. (Gallagher 2002).

So, careful attention to division of your proposal into binders and volumes, clear labeling, and judicious use of divider tabs can help evaluators find what they want.

Binders and Volumes. Some proposals will fit into a single small binder (1-2”); others will require multiple binders, either because of volume or because the RFP specifically requires separation of volumes.

Careful attention to division of your proposal into binders and volumes, clear labeling, and judicious use of divider tabs can help evaluators find what they want.

When you separate the proposal into multiple volumes, consider the following:

- Follow RFP specifications. Federal and state procurements commonly specify that technical and cost volumes be separately packaged and boxed, to ensure fair evaluation of technical components independent of price.
- Minimize the number of binders. This increases the probability that the evaluator will find the information in the binder she already has. But…
- Keep binder size reasonable. While binders may be available in sizes up to 5” or larger, remember that large binders have drawbacks. They are harder to handle and consequently more likely to be dropped and more likely to suffer ring damage during shipping because of the weight of the paper on the rings.
- Label binders clearly. Make sure the spine and cover inserts clearly indicate the solicitation reference number and title, your name as the bidder, and the contents of the binder. When labeling the contents, be as specific as possible. For example, if you split the technical proposal into two volumes, label them “Volume 1 of 2 – Sections 1 through 5” and “Volume 2 of 2 – Sections 6 through 8” instead of simply “Volume 1” and Volume 2”. This makes it easy for the evaluator to know which binder contains the section she needs.

Tabs. Divider tabs are an excellent way to make it easy for the evaluator to find each section, attachment, or exhibit in your proposal. However, if misused, the tabs will create confusion, instead of alleviating it. Consider the following:

- Use an appropriate number of tabs. The appropriate number is a trade-off between usability and complexity. If the evaluator is greeted by a “forest of tabs” when she opens the binder, usability is low. In that situation, most of the tab labels may well be obscured by other tabs, making it difficult to see the desired section. Instead, tab only major sections of the proposal, and tab

attachments or exhibits individually. If tabbing individual attachments or exhibits creates too many tabs, consider grouping related attachments or exhibits under a single tab, then using colored insert sheets to separate components.
- Label the tabs clearly. For proposal section tabs, put the section number and title on the tab. For attachments or exhibits, put the title and reference number on the tab. Pre-labeled tabs using alphabetical or numerical sequences seem like a good idea – you have to print only the index sheet with the cross reference information – but it introduces one more step for the evaluator to determine the location of the information.

Use Access Tools

Tools that speed the reader's retrieval of the desired content must be accurate and complete (Corbin et al. 2002, 293). You can assist the evaluator in finding the desired information by providing a comprehensive table of contents, a complete index, and useful cross-references.

Tools that speed the reviewer's retrieval of the desired content must be accurate and complete.

Table of Contents. This is an essential component of all but the very shortest proposals – even at 15 pages or so, you should include a table of contents. Most tools provide automated support for inserting a table of contents – you simply indicate which heading styles or formats are to be pulled for the table of contents, and the tool does the rest. Be sure to verify that you update the table of contents, though, just before going to press; it is easy for errors to appear in the final version because of editing that your team did in pre-production.

Large proposals introduce new problems. They make it harder to flip back and forth to the table of contents, and the number of heading levels may make the table of contents long and unwieldy. To solve the first problem, consider using a "Section Table of Contents" at the beginning of each section. This will include only the headings relevant to that section. To solve the second problem, consider using two levels of table of contents: the first has only the first and second level headings in each section, and is labeled "Contents Overview" or something similar, while the second has all heading levels and is labeled "Table of Contents" or "Comprehensive Table of Contents."

Many state and federal proposal submissions require you to provide an electronic copy of the proposal in either Adobe Portable Document Format (PDF) or in standard Microsoft Office formats (Microsoft Word for the proposal body). You can make these electronic versions easier to navigate by using the hyperlink functionality provided with Adobe Acrobat or Microsoft Word respectively. That is, create hyperlinks between the entries in the table of contents and the section headings for those entries in the body of the document. Use hyperlinks for cross-references as well – the evaluator will appreciate the ability to click a link to read more information.

Index. A good index is invaluable, but it is often overlooked in the rush to complete, produce, and ship the proposal. It is invaluable because it allows the evaluator to quickly find more information about something they just read, or answer questions they have about a particular topic. It is often overlooked because most authors simply have never created an index.

My personal indexing process has three steps. First, I identify the terms or phrases on each page that might be worthy of indexing. You can most easily do this by making one or two passes through the book, scanning each section, and making notes on the page about terms or phrases of interest. Here are a few hints:

- When you identify a term or phrase of interest, imagine how another reader might think of this concept, and add those words or phrases to your notes for that page. For example, if you are indexing the term "global," remember that someone else might think "worldwide" when they search the index.

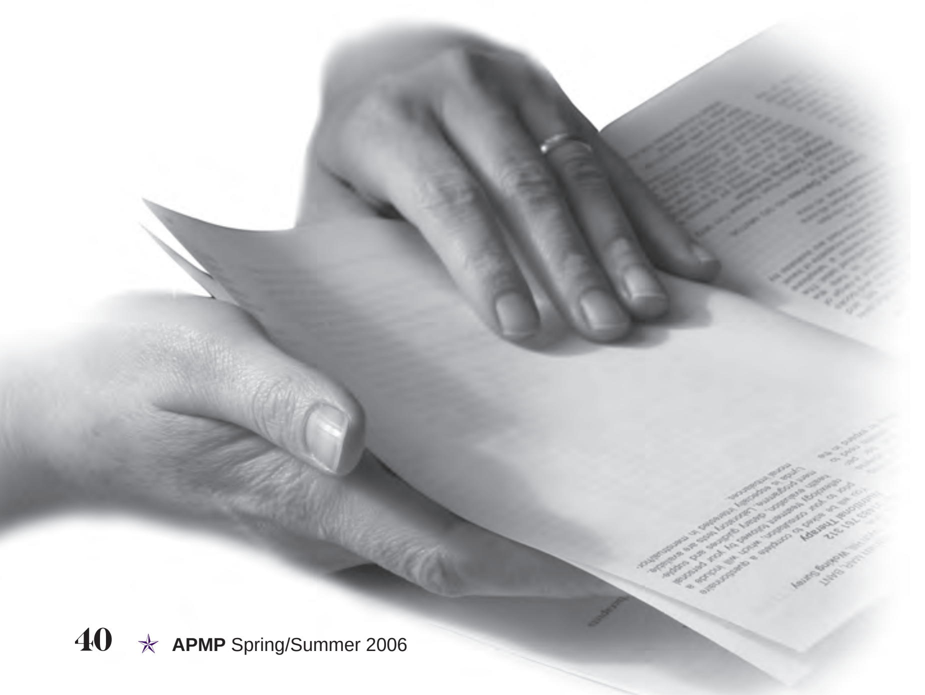
- Consider inversions of terms or phrases for inclusion in the index. That's because each reader might categorize things differently. For example, if you index "hardware testing" and "software testing," add "testing, hardware" and "testing, software" as well. This increases the likelihood that the evaluator will find the desired section.
- Be relevant *and* inclusive. Some guides to indexing suggest that you remove terms from your final index if an edit shows that the index target really does not have much substance. (That raises a new question about your proposal!) But, you need to be sure the index is complete as well.

Second, your production staff can insert the index entries. Most of the tools used for proposal production include automatic indexing tools; if you insert the entries, they will collate and format the index with page numbers. Remember that some index entries have a two-level format (e.g. "testing, hardware" and "testing, software"). These need to be inserted appropriately so that they will format correctly in the result, such as the following:

Testing

Hardware	35
Software	52, 68

A good index is invaluable, but it is often overlooked in the rush to complete, produce, and ship the proposal.



Third, you will need to edit the index. This corrects typographical errors made during insertion of index entries, helps you see where you made incorrect references, and can help trigger insertion of additional entries to address indexing ideas you did not think of immediately. You should also test several entries to ensure that you can find the relevant topic through the index. For good advice, see *The Art of Indexing* (Bonura 1994).

Cross-References. Doing cross-references well is difficult. Problems include lack of good tool support for cross-references and lack of knowledge among authors about where the desired information resides. Sometimes it is hard to know whether to cross-reference or simply repeat the information: will the evaluator have the other part of the document, will she look at it, and will it be complete enough to satisfy her needs?

If the proposal is very short (less than 20 pages), simply referring to the title of the other section is usually sufficient. Be sure, however, that the title you mention matches that of the final section that you cross-reference! A better choice, however, is to quote at least the title and section number; best is to quote the title, section number, and page number. For the latter, software tool support is essential. Be sure, too, that the cross-referenced page numbers are correct before going to print. Otherwise, you will frustrate the reader when she flips to the indicated page and cannot find the referenced information.

For very large proposals, spanning multiple volumes, you may need to include the volume number in the reference. Unless the tool specifically provides some support for multiple-volume documents, you may need to insert the volume number by hand.

Rule 2 – Clarify Meaning

Conveying meaning clearly and effectively is hard work. People who are eloquent and economical speakers often have trouble replicating that ability when faced with a blank

sheet of paper, and the result can be a torrent of words that has little to do with the customer's requirements or the bidder's proposed solution.

Often, the proposal team simply does not have enough great writers who also understand the details of the approach and can convey those details in an understandable way. So the task often falls to editing – how do we take what was created and mold it into something the evaluator finds easy to use? There are many books on editing (e.g. Rude, 1991; Tarutz, 1992; Plotnik, 1982; Judd, 1990), but a few simple techniques can dramatically improve the proposal and make it easier for the evaluator to understand what you mean.

Edit Aggressively, But Clearly

Writing is a creative act. It can be hard to receive aggressive feedback about something that is so personal and difficult. Improving the proposal, though, requires that editors and reviewers provide aggressive, clear, and constructive feedback about the work. Otherwise, what you ship to the customer remains what was originally written – and one has to have a team of world-class writers, let alone proposal writers, for that to be a clear, concise, and engaging document.

> *Writing is a creative act. It can be hard to receive agressive feedback about something that is so personal and difficult.*

Aggressive editing means that if something bothers you, mark it. If it needs to be changed, mark it. If it should be taken out, mark it. If more information is needed, mark it. Do not let the writer assume that everything is fine, then tell others in management that the proposal is terrible. You must provide feedback.

That feedback should also be clear. Proofreader's marks simplify markup by making it easy to know what should be changed. Most dictionaries include such marks, or references are available via a simple Google search (Merriam-Webster, date unknown). Instead of saying "find another word," indicate exactly what word to replace and what word to use instead. Feedback must be constructive and complete. Markups that essentially say "this section is confusing" or "this section is terrible" are not helpful. Instead, provide editing input, in a separate document if necessary, that shows exactly how you would improve the section.

For a straightforward example of useful editing, see pp. 56-57 of Stephen King's book *On Writing: A Memoir of the Craft* (King 2000). My favorite book on editing is *Line by Line: How to Edit Your Own Writing* (Cook 1985).

Edit in Multiple Passes

Editing, while often easier than writing, is still hard work. It is easy to bog down in details: "how do I fix this paragraph," "why is this word here," "gee, the formatting of this heading is wrong." By trying to do everything at once, the editor drowns in minutiae – and edits inconsistently.

The NASA Jet Propulsion Laboratory has published the *Levels of Edit*, formalizing the ideas of performing different kinds of editing operations on a document (Van Buren and Buehler 1980). However, for most applications, it is sufficient to simply make a checklist of all the different editing operations that you will need to make, then execute those operations in sequence. Try breaking them down into the lowest-level operations possible; this makes it easier for the editor to complete each item on the list without distraction or confusion. For example, your edit list might contain the following:

1. Check that all requirements are addressed with a solution in each section
2. Check for introductory summaries for all sections
3. Check formatting of 1st through 3rd level headings
4. Check page breaks
5. Check usage of job titles
6. Check page numbering across sections
7. Check capitalization of terms
8. Check to remove passive voice
9. Check definition of acronym for the first time used in each section.

The first example above is the hardest for the editor to follow. Keep in mind, though, that when working on this edit, the editor should not address the other edits – only number one. Similarly, when checking for definitions of acronym upon first use in each section, the editor simply focuses on scanning for acronyms, then notes whether the acronym definition is provided when the acronym is first used. Processing the document in this way makes it easy to ensure that the editor does not miss anything – and in particular, treats the author fairly and consistently.

Sentences that are too long distract and confuse the reader.

Avoid the Passive Voice

While the admonishment to "use the active voice" has been with us for some time (e.g., Strunk and White 1979), passive voice seems to pervade original drafts of proposal text. The passive voice uses various forms of the verb "be," and lacks clear assignment of responsibility for actions. Writers use passive voice for many reasons: it sounds more "formal" and it fills the page faster by using more words to express the same idea. For example:

> *Our Operations system is configured with edits that verify the accuracy and validity of all data that is submitted by team members.*

This is passive – who configures the system? The following, in active voice, is more informative:

> We *configure our Operations system to verify the accuracy and validity of all data submitted by team members.*

Editing for this problem alone can reduce the page count of your proposal, significantly improve readability, and make your response sound more direct and credible. See *Writing for Human Performance* (Spyridakis & Wenger, 1992) for a survey of research on this topic and related topics on writing construction and readability.

Reduce Sentence Length

Sentences that are too long – especially when there are several back-to-back – distract and confuse the reader. Because of the number of words and separate clauses within the sentence, the reader has to perform more processing to assemble the ideas into a coherent whole and process the meaning. Such sentences also seem to be more prone to punctuation problems: are all the necessary commas in place? Should there be a semicolon or a comma in this position?

Consider the following:

> *In order to ensure SuperCo is able to support our current business and planned growth, we evaluated the industry specific applications available and have decided to migrate to Conglomerate Ltd.'s industry-leading Solves-It version 28.0, which runs in a multi-server n-tier environment using an Oracle relational DBMS.*

This sentence is 46 words. It is easy to break into multiple sentences (and enhance):

> *To ensure we can continue to support our current business and planned growth, SuperCo recently evaluated industry-specific software applications. We have selected Conglomerate Ltd's industry-leading Solves-It. This system runs in a multi-server n-tier environment using an Oracle relational DBMS, ensuring system scalability and redundant processing capability in the event of a component failure.*

While the overall length is greater, the longest of the new sentences is 27 words, a good working maximum. Each idea is easier for the reader to grasp. Look at another example:

The EndlessOil 2.0 Fuel Injection System offers rapid programmability for fuel mixture changes, easy design adaptability to various gasoline engine applications, durability in punishing under-hood environmental conditions, simplified self-diagnostic using an inexpensive tool configuration, and guarantees high fuel efficiency for all rated applications.

This sentence has 43 words, but is not too hard to read. But look at the alternative, which uses a bullet list:

The EndlessOil 2.0 Fuel Injection System offers:

- *Rapid programmability for fuel mixture changes*
- *Easy design adaptability to various gasoline engine applications*
- *Durability in punishing under-hood environmental conditions*
- *Simplified self-diagnostic using an inexpensive tool configuration*
- *Guaranteed high fuel efficiency for all rated applications.*

Each paragraph should only address one concept or idea, elaborating as necessary on that idea.

The new construction has only one less word – but it is very easy for the reader to quickly scan the list of features to ascertain whether you meet all the requirements. An improved version would link each feature directly to benefits that the customer would receive from this system. The bullet list also emphasizes the feature words for the evaluator, making it easy to recognize your system's capability.

Limit Each Paragraph to One Topic

Each paragraph should only address one concept or idea, elaborating as necessary on that idea. Such elaboration, though, does not include trying to take the reader into unrelated ideas. You will confuse the reader – "how does A relate to B? I don't get it." As a result, you lose their focus and concentration on your message.

Consider the following example:

Robert Jones has 27 years of direct experience managing systems similar in size and scope to the one we offer XYZ Corporation. He has been responsible for system planning, design, configuration, installation, testing, and maintenance. Our maintenance approach offers you guaranteed 4-hour response time, overnight parts delivery from multiple regional parts warehouses, and skilled technicians. Mr. Jones will ensure that maintenance is performed skillfully on your systems in accordance with the performance standards.

The evaluator's response to a paragraph such as this is: "huh? Are they talking about Mr. Jones management qualifications, about maintenance approaches, or about management approaches to ensure successful completion of the work?" It simply is not clear.

Experience with this type of writing shows that the problem usually falls into one of three categories:

1. Someone made an error in a cut-and-paste operation, and things are now in the wrong place. This is a relatively common error, especially under the rapid development cycles required for proposals. Read the rest of the section to determine what was supposed to happen, then correct the work.
2. The author was distracted during composition of a single paragraph and simply made a mistake. Ask the author what was intended, and she will usually be able to correct it easily. (More often, the correction will be apparent through context.)
3. An entire section is filled with paragraphs like this. This is common when the proposal team has a number of authors whose expertise is in an area other than writing. Asked to tell what they know about a particular idea or set of ideas, they simply fill page after page until they have captured it all. To fix the problem, you will need an editor or experienced author with a good sense of classification to determine which sentences throughout the sec-

tion belong together. Group those sentences into new paragraphs, eliminate redundant ideas, then write transitions or reword sentences to improve structure and flow.

Throw Away Non–Contributing Material

Years ago, a friend who is a respected technical writer told me about the experience of writing his first book, which was about business writing. The editor told him, "Great book, but you need to throw away the first chapter. It sounds like you are clearing your throat."

Much introductory material falls into that category…while the writer searches for ideas, anything in her stream of consciousness slips onto the page. Yet we are often reluctant to remove it – it helps us reach the page limit, right? There must be something of value said in there, right? But it does not help the evaluator; instead, it confuses, bores, and distracts her. So – if it does not contribute to convincing the reader that yours is the best solution, throw it away.

> *If [your introductory material] does not contribute to convincing the reader that yours is the best solution, throw it away.*

Standardize Usage

An old technical writing admonition is to call a thing by one name only. But, when multiple authors are working on a proposal, or even when the same author works on different sections, it is easy to forget what name was used for a process, job title, or system. This confuses readers – they are not sure what is being discussed, and may not know that you are referring to the same thing. To avoid this, use the same name throughout the proposal when you are referring to the same object or concept, and use the name that the customer uses.

You can help other authors, editors, and reviewers to enforce the conventions by communicating this usage throughout the proposal team. We usually create a usage guide for each proposal that has a simple three-column table. The first column has the approved name; the second has variants that are not to be used; the third has the rationale for using the approved name, such as "company convention" or "RFP usage."

Conclusion

Simplifying life for evaluators, in many ways, is akin to improving usability for documents or readability for any written text. The primary issues are to remove physical and logical barriers to accessibility of the information in the document, and to clarify the information itself so the evaluator can easily decide that "yes, this is the answer we're looking for." My own experience in proposal development shows that evaluators respond positively to these improvements, as these two examples illustrate:

- A client won a multi-billion dollar, multi-year federal healthcare contract. In the post-award conference, the contracting agency told client representatives that "Your proposal was easy to read, and we understood exactly what you were going to do."
- Another client won a multi-million state healthcare contract. Representatives of the contracting agency effusively praised the proposal as easy to read and understand, and said that it was clearly the most professional of the several proposals submitted.

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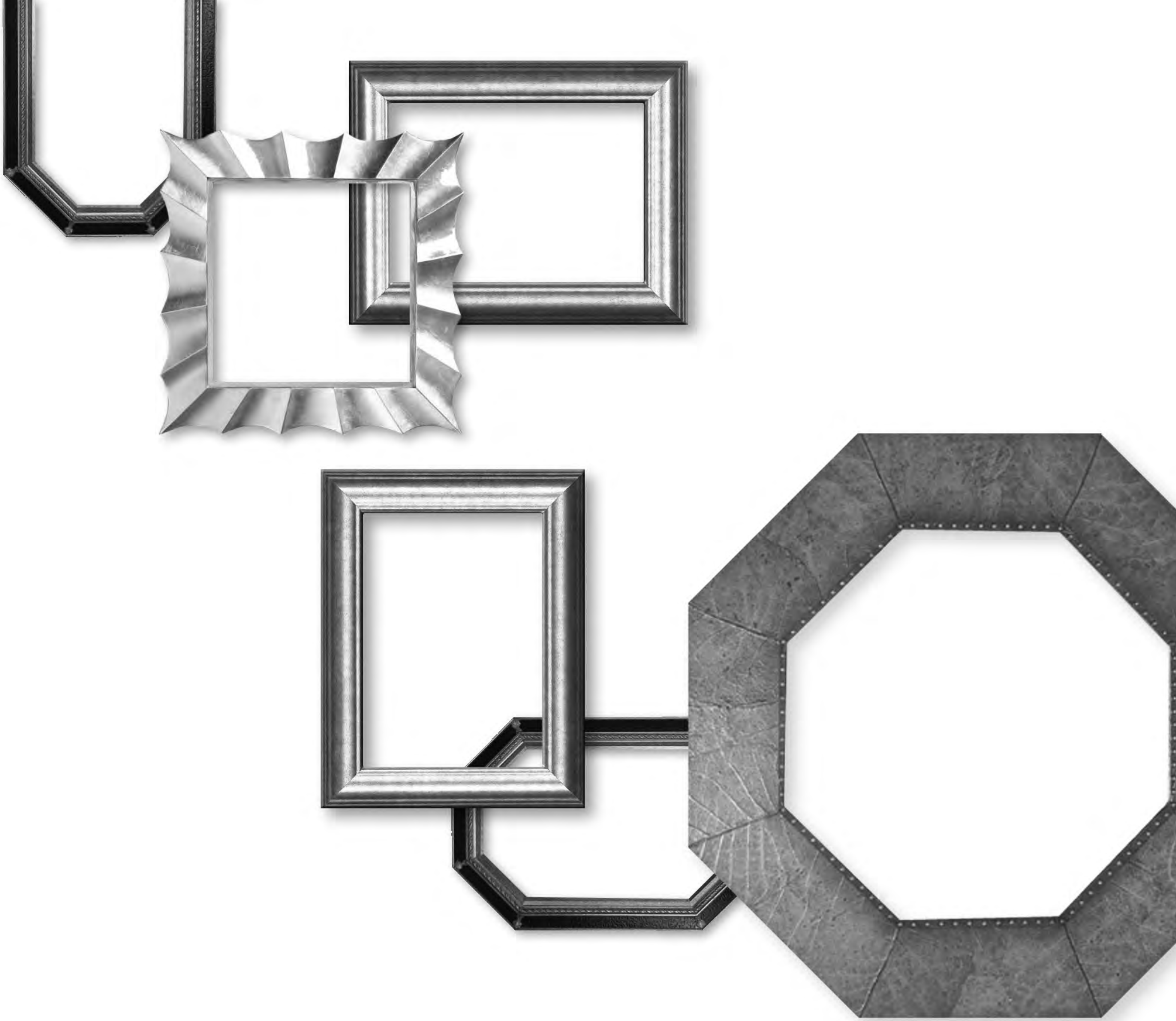

Framing

An Exciting and Proven Tool to Align Your Customer's Thinking with Your Proposal Story

As Harry S Truman crisscrossed the United States during the landmark presidential campaign trail in 1948, his train stopped at hundreds of communities of all types and sizes. Truman easily conveyed to crowd after crowd that he was one of them. How was he able to do this so effectively? To farmers from Fresno, California to Raleigh, North Carolina, Truman spoke of his father's farm. His familiarity with the tools and terms of farming allowed him to nimbly introduce agricultural metaphors to condemn his opponent's farm policy.

By Robert S. Frey

Unlike the cosmopolitan Governor Thomas E. Dewey of New York, Truman spoke comfortably before the National Plowing Match in Dexter, Iowa. There, he told the audience that as a youth, he enjoyed "a reputation of being able to sow a 160-acre wheat field without a skipped placing showing in it" (Neal, 2003). Plainly, Truman's knowledge of the finer subtleties of plowing established him as both genuine and accessible. He succeeded in activating the "frames" of farming and country life embedded deeply within the minds of America's rural population. By doing so, he adroitly aligned himself and his political platform with the voters in the heartland of this country.

In the late 1940s, nearly 40 percent of the US population still lived in rural areas. And more than 10 percent were directly engaged in farming. By 1990, however, only two percent of America's population was involved directly in farming, and the overall rural population had fallen to about 20 percent. Truman's political framing would not have worked 40 years later.

That Truman was successful in having voters, in turn, align their sentiments (*read*: mental pictures, or frames) with him is borne out in his stunning and completely unexpected victory over Dewey. This despite the headline that screamed from the front page of the prestigious *Chicago Daily Tribune*—"**DEWEY DEFEATS TRUMAN**"—the morning *after* the election.

> *"Salience" means making a piece of information more noticeable, meaningful, or memorable. (Entman, 1993, p. 54)*

The Power of Framing

Significantly, framing activates existing beliefs and thoughts, rather than adding something new to an individual's beliefs about a given issue (Nelson, Oxley and Clawson 1997, 236). It is helpful to present the story in a vessel familiar to most listeners (Ibarra and Lineback 2005, 70). Harry Truman, for example, built on well-worn mental tracks to connect his political platform with the thoughts and sentiments of America's voting population in 1948. He chose to frame his stories around the familiar tools and longstanding lore of agriculture rather than "something new" for that era, such as television technology and programming. In fact, in 1948 only 1 in 10 Americans had even seen a television set!

Frames exert their distinctive power through the selective description and omission of features of a situation (Entman 1993, 54; see also Hallahan 1999, 207). As shown in Figure 1, selecting appropriate frames will help your customer resonate with your solution.

Increased Proposal Success: Connecting with the "Known"

- Why try to introduce the British ITIL quality standard for managing IT services to a customer who is already familiar with and using ISO 9001:2000 standards?
- Why propose a Project Manager (PM), Deputy Project Manager, and three Task Leaders to manage a project on which the customer is used to interacting with one "working" PM and two "working" Task Leaders.
- Why offer a monthly, paper-based performance satisfaction assessment program to a customer who is reticent to complete automated performance assessments on an annual basis?
- Why introduce a 6-company team to perform on a program that has been awarded historically to a contractor that offers a streamlined, two-vendor solution?
- Why design and build your proposal documents in a manner that does not adhere to the structure, nomenclature, and sequence provided in Sections L, M, and C of the government's final Request for Proposal (RFP)—an RFP that the government spent months developing and reviewing?
- Why frame the benefits of your organization's solution in terms of exacting schedule control when increased return on investment (ROI) and decreased total cost of ownership (TCO) are the critical customer success factors?

Figure 1. Selecting the right frame to tell and sell your story.

One of the key questions that a company must ask when pursuing a bid opportunity to provide services, products, or knowledge sets to the U.S. federal government is, "Who must we be to win?" Initially, this question might appear confusing. So let us unravel it to see why it is so important.

There are many facets that make up the overall image of your company. Representative facets might include:

- Small business
- Minority-owned business
- Woman-owned business
- Financially stable firm
- Mission support contractor
- Performance-based support contractor
- Proven prime contractor
- Core competency in information technology
- Core competency in engineering
- Core competency in telecommunications support
- Core competency in scientific support
- ISO 9001:2000-certified organization
- Established defense contractor
- Known NASA contractor
- Documented cyber security provider
- Employee-focused culture.

For a given bid opportunity, emphasizing (that is, "giving salience," academically speaking) your organization's woman-owned business status and core competency in telecommunications support may well be the ideal picture you want to paint. On another bid opportunity, your firm's financial stability, core competency in engineering, and being a known NASA contractor may constitute the image that you want to frame, and then project to your customer at multiple points and in multiple ways (e.g., narrative, graphics, cover art) throughout your proposal.

Note that the majority of the descriptive elements that comprise your organization's overall image are *not* employed when answering the question, "Who must we be to win?" Most are, in fact, omitted. Deciding what information to present (inclusion), what points to emphasize (salience), and what information to omit (exclusion) is a critical process in framing exactly what image of your company you want to project to your customer (see Figure 2).

One other important step must be accomplished at this juncture as well. It is critical to

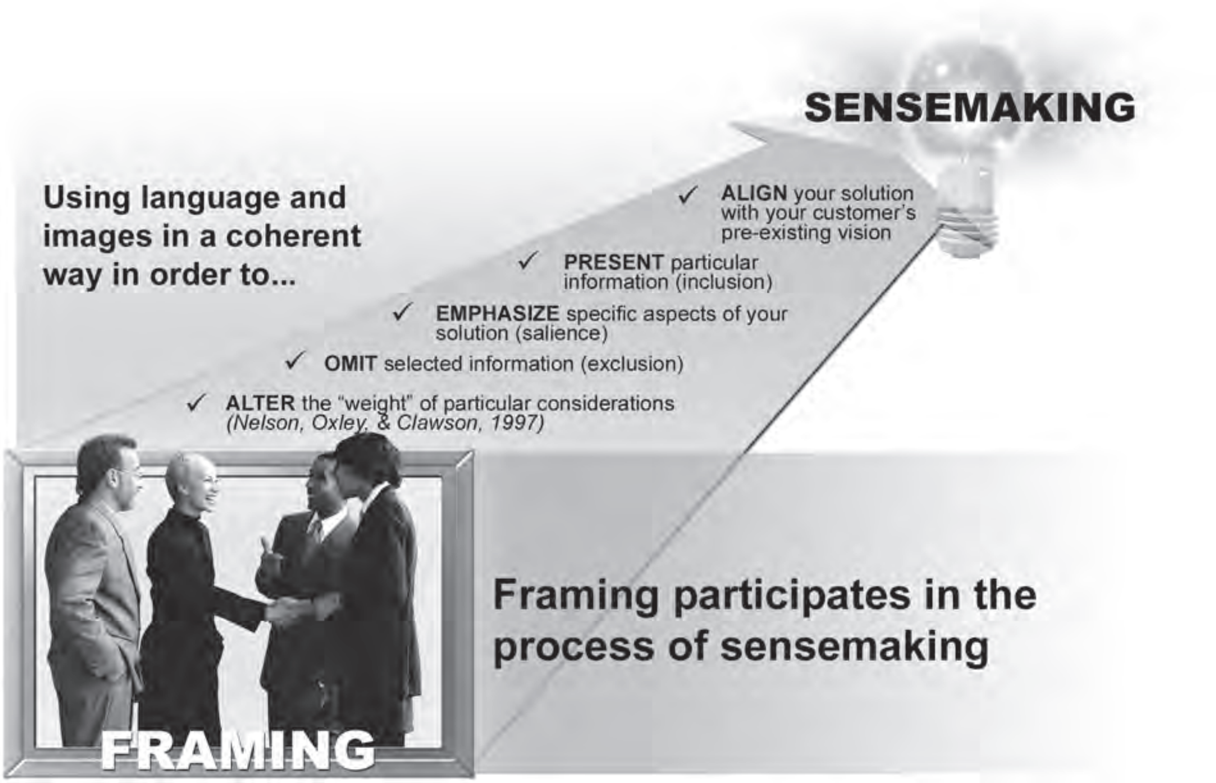

Figure 2. Framing participates in the process of sensemaking for government evaluators.

alter the weight or importance value of particular elements. In the example above where your firm's financial stability, core competency in engineering, and being a known NASA contractor were the key elements in the image that you want to frame and project to your customer, it is also important to weight one element as the most vital. It may be financial stability, given validated marketing intelligence that your Business Development staff uncovered which indicates the current incumbent contractor's difficulty in meeting payroll during contract startup or its inability to offer prepaid educational and training benefits to it employees. Frames lend additional weight to an already accessible concept by influencing its perceived relevance or importance (Nelson, Oxley, and Clawson 1997, 236-237).

To frame, therefore, is to select some aspects of a perceived reality and make them more salient in a communicating text in such a way as to promote a particular problem definition, causal interpretation, and/or recommendation for the item described (Entman 1993, 52). The same certainly applies to graphics as well.

A frame offers perspective by managing the alignment of the observer (read: federal government evaluator) in relation to an issue (read: your company's image or your proposed solution set). In addition, a frame directs the observer to focus on a feature of an issue within the frame, and then to disregard other features of the same issue that fall outside the frame. Finally, a frame influences subsequent judgment in that it organizes and tailors information to fit into it. It therefore not only contains, but also constrains (Venter 2004).

A frame offers perspective by managing the alignment of the observer (read: federal government evaluator) in relation to an issue (read: your company's image or your proposed solution set).

In his ballad "Against the Wind," guitarist Bob Seeger sang about "What to leave in, what to leave out." These song lyrics are directly analogous to framing as it relates to proposals. We as proposal professionals have to make very conscious choices about what to leave in—that is, include within the frames that we present to the government—and what to leave out.

Grasping the Highlights of Framing Theory

Solid academic research and real-world applications provide the foundational underpinnings for framing theory and practice. Framing theory has been applied extensively in the areas of political analysis, broadcast journalism, news reporting, public opinion, advertising, and communications (Scheufele 1999, 104). Amos Tversky and Daniel Kahnemann should be seen as the founders of framing theory.

Framing is conceptually connected to the underlying psychological processes that people use to examine information, to make judgments, and to draw inferences.

Contrary to the central concept of "rational choice theory," where people always strive to make the most rational choices possible, framing theory suggests that how something is presented (i.e., "the frame") influences the choices people make (www.valuebasedmanagement.net/methods_tversky_framing.html).

Framing is a process distinct from traditional persuasion via belief change (Nelson, Oxley, and Clawson 1997, 235). It is conceptually connected to the underlying psychological processes that people use to examine information, to make judgments, and to draw inferences (Hallahan 1999, 206). Framing is grounded in "prospect theory," which integrates the psychology of decision evaluations with the economic theory of customer choice. Prospect theory argues that people evaluate purchases in terms of gains or losses, relative to a reference point (Smith and Nagle 1995, 99-100).

In addition, the cognitive consistency theory in psychology explains that a person is more likely to accept new claims if they are shown to be similar to already accepted ideas and practices. Advocates (read: proposal professionals) must attempt to construct frames that resonate with the broader understanding of customers (Payne 2001, 10).

Finally, framing theory asserts that the way in which we receive information—indeed, how the story is told, begins to structure how we view what has transpired (Hayden 2003, 5). At its core, frame analysis is the study of how events in everyday life are organized or made sense of in coherent ways. "We react to things in the world based on the information coming to us through frames" (Stout and Buddenbaum 2003, 1). In effect, framing participates in the process of sensemaking, as shown in Figure 2 (Hayden 2003, 6).

Framing, Photography, and Proposaling

Frames refer to lenses that stakeholders (read: government evaluators) use to make sense of the information (Gray 2004, 167). These lenses can be applied selectively to frame customer requirements in such a way as to align with your company's solution sets, as shown in Figure 3. For example, your customer's (in this example, the Department of Energy) requirements as presented in the Statement of Work (SOW) of the RFP or Statement of Objectives (SOO) in the RFS, may focus on Tier 1 and Tier 2 help desk support.

Your company may elect to frame your solution strictly in terms of help desk solutions and Tivoli, Citrix, Control-F1, and Applix commercial-off-the-shelf products. Alternatively, you might frame the customer's requirement in terms of enterprise-wide information cyber security governance, management, and architecture in accordance with the Federal Information Security Management Act. Finally, your company might expand the ramifications of the basic task- and project-level help desk requirements to frame the ultimate requirement as helping the customer agency get to "green" on the Office of Management and Budget's (OMB) Exhibit 300s.

How we look at things **matters.**

The Exhibit 300s constitute part of the Executive Branch Management Scorecard to track how well federal departments and agencies are executing the five President's Management Agenda (PMA) components. Precisely how you elect to frame the Department of Energy's requirements will depend upon the marketing intelligence that you collect and validate. But, as illustrated in Figure 3, a very different picture emerges depending upon the lens you choose to use. Any event (or in this case, the solution) can be framed in multiple ways (Chyi and McCombs 2004, 30).

Figure 3. Frame the same requirement in different ways to align your solution set and corporate strengths with your customer's vision.

Pictures, Maps, and Stories

American journalist and political commentator Walter Lippmann, who wrote the influential book *Public Opinion* in 1922, asserted that people act based on "the pictures inside our heads" rather than on objective reality (Hallahan 1999, 206). George Lakoff writes that we understand words on the basis of a "mental map" (Miller 2005, 205). In general, people create stories to organize their experiences, create order, gain perspectives, and make evaluations (Escalas 2004, 168).

Pictures. Maps. Stories. A long way from logic, analysis, objectivity, metrics, and fact. Yet Stephen Denning, former World Bank knowledge management executive, says that "analysis might excite the mind, but it hardly offers a route to the heart." (Anonymous 2004, 7). The World Advertising Research Center finds that storytelling injects emotional value, thereby increasing the perceived value of the product (or proposal solution) and making it more attractive to buy or select as part of the competitive bid process (Fonnesbaek and Anderson 2005, 33).

Perception is reality.
–John Van Maanen, 1973

Stories work because they are engaging, easy to remember, and non-adversarial (Anonymous 2004, 7). Stories function as bridges, reaching across boundaries of culture, profession, and age (Hale 2004, 50; Harris and Barnes 2005, 7). Dr. Deborah Sole of Harvard University asserts that stories can convey one's trust-worthiness, as well as signal one's trust in others (Sole 2002). Storytelling makes experience visible (Johansson 2004, 341). Importantly, all good stories have a basic and necessary characteristic, namely coherence, as illustrated in Figure 4 (Ibarra and Lineback 2005, 68).

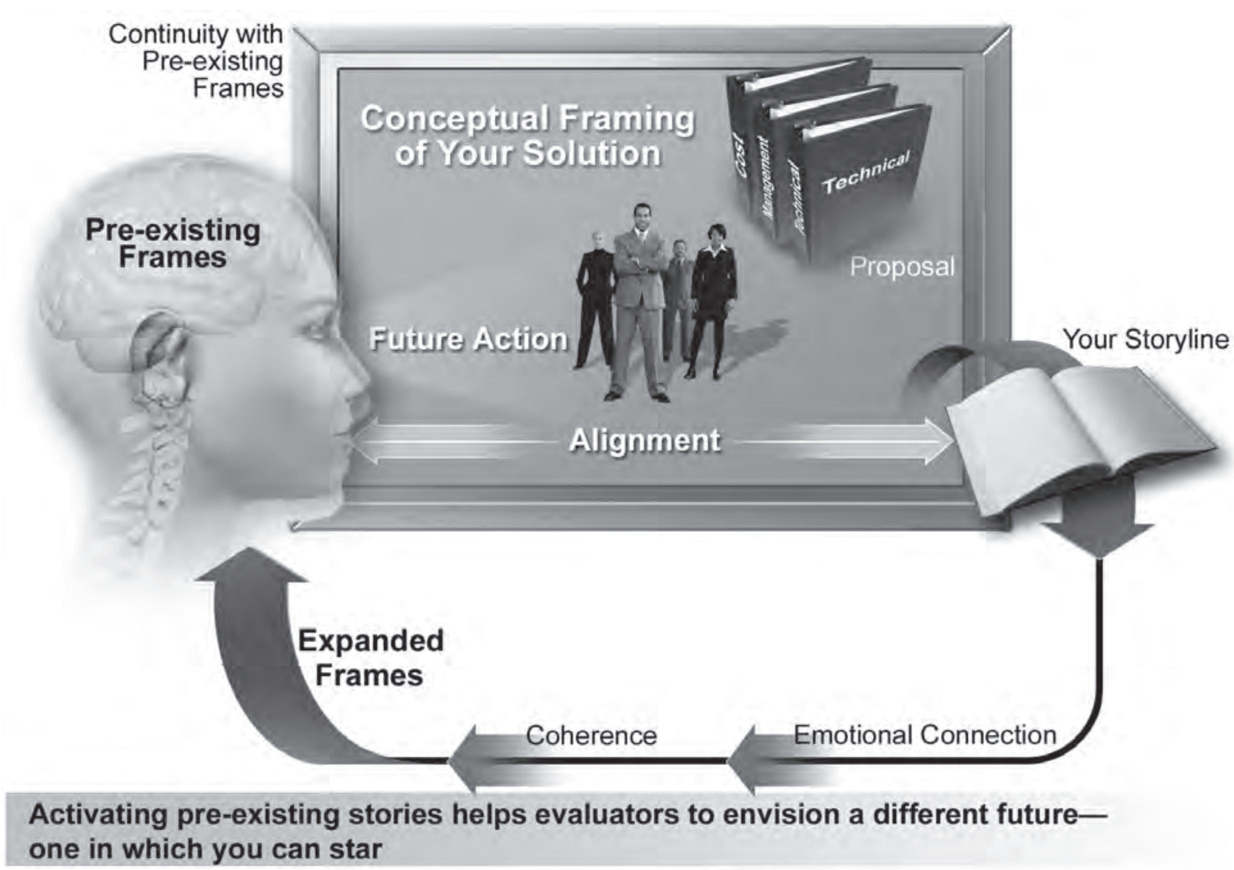

Figure 4. Aligning your proposal story with pre-existing customer frames of reference.

Applying Framing to Your Proposals

So you are working on your next competitive proposal to provide support services for one of the major civilian agencies of the federal government. With the direction provided in the PMA, you already know that this contract you are pursuing *must* focus on meaningful and measurable results. In addition, the PMA also tells you that this civilian agency—like all other federal agencies—*must* align its performance and business/financial processes.

Given this critical background information coupled with the project- and customer-specific marketing intelligence that your company has collected through business development activities and customer relationship management over the past six months, you might *frame* your management solution to include processes and tools that track, document, and provide near-real-time insight into project performance. Furthermore, you might convey the strengths of your proposed key personnel in your staffing section through the "frame" of staff professionals committed to and experienced with performance-based contracts, and meeting the metrics associated with Service Level Agreements and Service Level Objectives. Your past performance volume or section might be framed to highlight performance-based contracts and service delivery models of operation. Additionally, your technical volume or section might include discrete subsections that focus on or, in effect, frame your solution set in terms of embracing metrics across the scope of the contractual work to be performed. "A frame is a central organizing idea for making sense of relevant events and *suggesting what is at issue*" (Nelson, Oxley, and Clawson 1997, 222). Given this fact, your proposal can frame every aspect of your solution set for this civilian agency in terms of meaningful and measurable results.

> *Frames offer proposal professionals a powerful tool for aligning proposal solutions with customers' pre-existing sentiments and mental pictures. Try applying them on your next proposal. They work. That's my story and I'm sticking to it!*

By taking this approach, you are emphasizing specific aspects of your solution, presenting particular information and omitting other information, and aligning your solution with your civilian agency customer's pre-existing vision (PMA, performance-based contracting) as shown in Figures 2 and 4. It is important to note that page count restrictions contained in RFPs are not the primary drivers of what information to include or omit in your proposal. Rather, your solution and the frames in which that solution is constructed should drive these decisions.

Inspiration for this article came from Seth Godin's recent book, All Marketers Are Liars: The Power of Telling Authentic Stories in a Low-Trust World.

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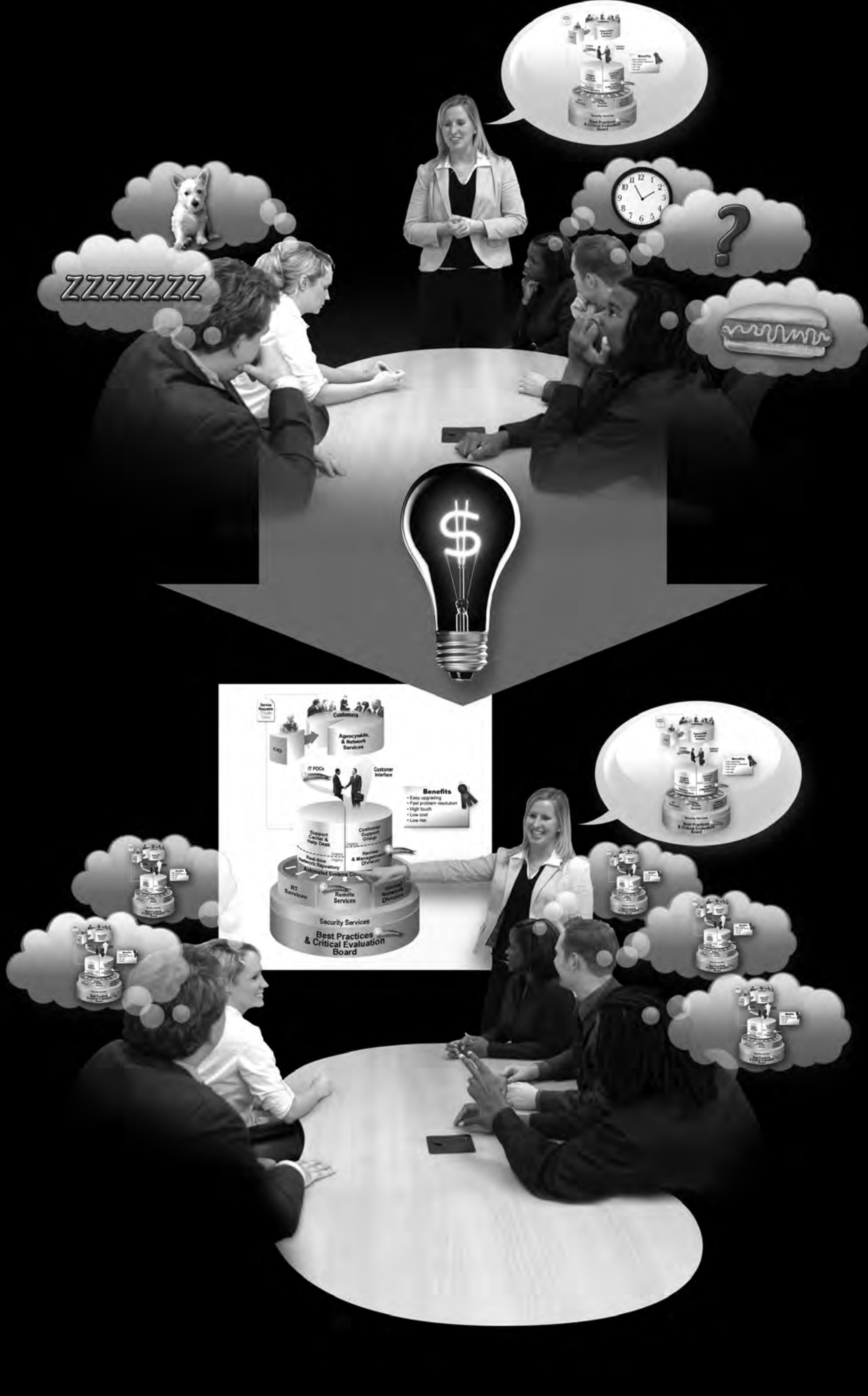
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Customers
Agencywide, & Network Services
CIO
IT POCs
Customer Interface
Benefits
• Easy upgrading
• Fast problem resolution
• High touch
• Low cost
• Low risk
Support Center & Help Desk
Customer Support Group
Review & Management Division
RT Services
Remote Services
Security Services
Best Practices & Critical Evaluation Board

Making Graphics That Communicate Clearly

By Michael Parkinson

"What is your number one proposal graphic challenge?" We polled the 2005 APMP Annual Conference attendees with this question. Again and again we heard, "How do I make graphics that effectively communicate the right messages?"

Are you spending too much time and money making graphics only to have your audience say, "I don't get it"?

The first step to solving this dilema is surprisingly obvious...

Graphics communicate up to 60,000 (Research conducted by 3M Corporation) times faster than text and can increase the odds that you will win work by 43% (Research conducted by the University of Minnesota School of Management). To take full advantage of the power of visual communication, you must first focus on your audience. Your target audience is the sole reason why you are creating your graphic.

Before you begin conceptualizing and rendering your graphic, answer the following questions:

1. What do you want to say? (Why does it matter?)
2. To whom do you want to say it?
3. How do you say it?

> *The audience takes notice and begins to* **care** *if you can save them time and money, fulfill a pressing need, or reduce hassle and make their lives easier.*

What do you want to say? (Why does it matter?)

You might be surprised at the number of graphics that fail because the author did not have a clear idea of what he or she wanted to communicate. Typically, an author attempts to communicate too many messages through one visual. The resulting graphic is unsightly, hard to read, and fails to communicate the intended information. How do you avoid creating a graphic that fails to communicate the right information? **Decide what you want to say and know why it matters to your audience.**

Put yourself in the position of your audience. What would *you* want to know? You would probably want to know the following:

- What does it do?
- How does it do it?
- How much does it cost?
- How fast is it?
- How long does it take?
- What makes it better than anything else?
- How will it help *me* and my organization?
- How much money will it make me?
- Why should I buy it?

The audience takes notice and begins to *care* if you can save them time and money, fulfill a pressing need, or reduce hassle and make their lives easier. The more the target audience cares, the more attention is given to the graphic. The audience will not care about your product or service if the focus is not on them and their wants and needs. Let them see themselves in your visuals. Developing an information graphic that reaches the audience on this level involves research and an understanding of the target audience's desires and challenges. If you can

Use graphics to communicate your message clearly to your audience.

show that your quick service will save them 30% or $140,000 per year over their current service, then they will listen and care. Solve their problem; show them the benefits they will enjoy; and help them become enthusiastic about the subject and the prospect of having, using, or implementing it.

Use the graphic to highlight the most salient, audience-focused points. Make it *obvious* why the information communicated is important and valuable to the viewer. In Figure 1, the features, benefits, and discriminators are clearly identified and highlighted. The benefits box makes it obvious why the information communicated is important and valuable to the viewer.

Create a list of messages the graphic must communicate. Every information graphic has a hierarchy of messages. First, discern the *number one* message. What is the most important point to be communicated in the graphic? What one idea most supports the primary objective? Then determine the secondary and tertiary objectives. There will be instances where not all the desired information can be communicated in one graphic. In fact, it is better to communicate only the most relevant and necessary data; otherwise, you may sacrifice clarity, which usually results in the graphic's failure.

Your messages should answer your audience's questions. What you say must matter to them. Show your audience the benefit to them and you take the first step to creating a graphic that communicates clearly.

To whom do you want to say it?

Have you heard someone use an acronym you did not know? How about a new slang term that was baffling? Were you ever lost while learning something new? How did it make you feel? You probably felt uncomfortable or agitated. To misunderstand or struggle with new information is not fun. It results in a host of negative feelings. For this reason **know your audience**.

To misunderstand or struggle with new information is not fun. It results in a host of negative feelings. For this reason ***know your audience****.*

Who will be viewing this graphic? What language do they speak? What are their buzz words? What are their hot buttons? What do they like/dislike (colors, imagery, detailed explanations, etc.)? What do they **really** want from this transaction (to work less, more free time, more money)? If you do not know much about your audience, find out! Ask them questions. Research their organization (visit their Web site). Talk with those that know them better than you. Without an understanding of the audience, you will not know what they want and need and how best to communicate that information. The more insight you have into your audience, the greater your chances for clear communication.

Figure 1. Make information obvious to the viewer – identify and highlight your features, benefits, and discriminators.

For example, which slide would be more communicative to the United States Army (A or B)? (See Figure 2).

Slide A focuses on the target audience and uses terms and imagery that they can understand and relate to. It addresses issues the Army cares about. The likelihood that the slide will clearly communicate the intended messages significantly increases. Slide B is focused on the presenter and what they want to say about themselves without regard to their audience. The presenter of slide B failed to learn more about the target audience (and the slide reflects that fact). They present slide B as if they were presenting to another business within their industry instead of catering to the potential client.

How do you say it?

A graphic should **simplify** data and present it in a way that highlights the most important points. We are presented with an increasing amount of stimuli: television shows and ads, news, movies, magazines, billboards, telemarketers, radio spots, and web sites all competing to get our attention. Some studies show that exposure to this increasing din of stimuli shrinks our attention spans. For example, Dimitri Christakis, a pediatrician at Children's Hospital and Regional Medical Center in Seattle said that because things change quickly on television, kids' brains may come to expect this pace, "making it harder to concentrate if there's less stimulation" ("Frequent TV watching shortens kids' attention spans," By Marilyn Elias, *USA TODAY*, Posted 4/5/2004). Considering the amount of stimuli to which your audience is exposed, your graphic needs to communicate the intended messages quickly and precisely. If the audience has to study your graphic for too long they will lose interest. The audience may become frustrated and lose faith in the presenter (the person, place, or thing most associated with the information graphic in the mind of the audience).

The following rules will result in the clearest communication:

1. Keep it clean and simple. Unnecessary visual clutter and too much data interfere with audience understanding. Focus on reaching the objective of the graphic and the most important messages that feed the objective. Your visual will fail to communicate if the target audience cannot quickly digest or is confused by the information graphic. If the graphic is too verbose or complex, the likelihood that the graphic will fail greatly increases. If needed, use another standalone information graphic to communicate what could not be included in one graphic. Avoid using too many different images, lines, shapes, patterns, textures, and colors. Limiting the number of visual elements and using a consistent style will help your information graphic communicate quickly.

Unnecessary visual clutter and too much data interfere with audience understanding.

Figure 2. Know your audience and develop your graphics accordingly.

The "10 second rule" has helped me create successful information graphics. There are several interpretations but I find this definition most applicable: If the target audience doesn't know and understand the main point (the most important message) of your information graphic within 10 seconds, the graphic will probably fail to achieve its primary objective. (See Figure 3).

When presenting technical data to an audience that may be less educated on the subject remove extraneous information that could distract them from the basic concept.

If the concept you are trying to communicate is abstract or likely to be confusing, use an analogy or metaphor. For example, an umbrella protecting us from the rain can help explain the purpose of the earth's ozone layer (protecting us from solar radiation). The concept of the ozone layer can be quickly communicated.

2. Stay consistent. Internal consistency cultivates a feeling of trust because it indicates to the audience that the information presented was designed through careful consideration. Inconsistency breeds confusion.

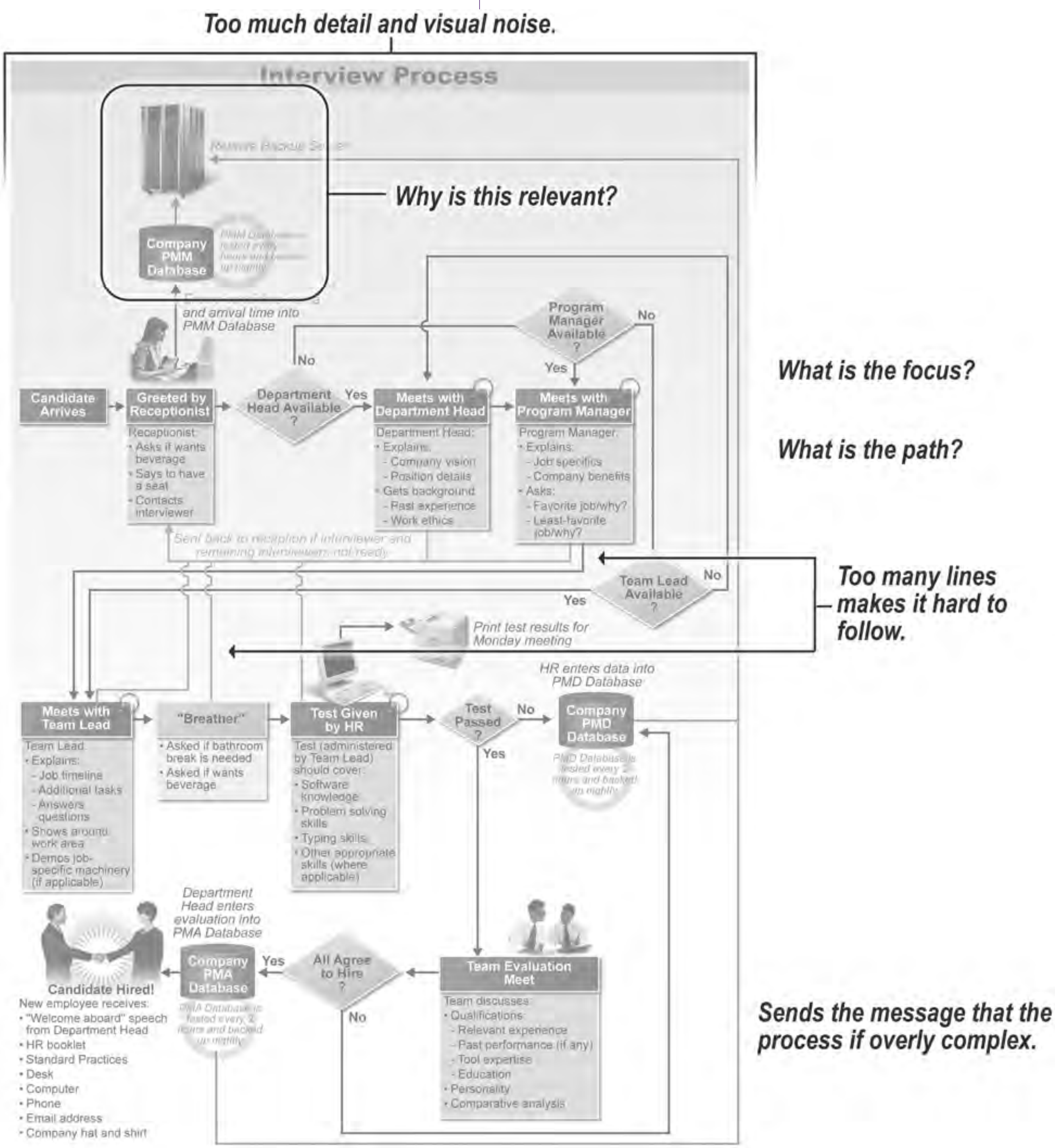

Figure 3. Simplify your data and focus on what is important for your view to understand.

Changes in graphic style, color, shape, and iconography without the target audience's understanding of the change results in miscommunication.

3. **All visual elements should have a specific role in the explanation and a reason for being chosen and incorporated.** This rule includes, but is not limited to, images, icons, symbols, shapes, colors, fonts, line weight, placement, and size. All aesthetic decisions should have a reason for being chosen that contributes to the graphic's objectives.

4. **Getting it right is far more important than being original.** As Edward Tufte, Professor Emeritus at Yale University and writer of seven information design books said, successful information graphics explain that which is intended. Being innovative at the cost of clarity is not an option."

"Speak, not so that you may be understood, but so that you cannot be misunderstood." –Quintilian

5. **Use imagery and content that your target audience understands.** When in doubt, err on the side of caution. Keep it simple. Always use recognizable images or quickly identify and explain any unknown imagery. If an image is introduced that is not recognized, understood, or quickly defined, the intended messages will be clouded or lost. For example, never show a low resolution, dark, or out-of-focus image that may not be identified or could be misinterpreted as something else. Additionally, never show an image of a valve switch to an audience that may not know what a valve switch is or does. If a new concept or entity must be introduced, define it. Label the visual elements. Share its relevance with your target audience. What role does it play in your messages?

6. **Have the information graphic professionally rendered.** This rule assumes your design resource is a professionally trained designer and experienced in the software required to complete the task (Adobe Photoshop, Illustrator, and Microsoft PowerPoint® are my choices). A professional graphic designer understands how to engage an audience, communicate a concept, and generate a positive emotional state. They should render an image that is easy and compelling to read.

A government evaluator of a presentation given by a large company specifically stated in their review that the presenter's use of clip art (flat, "canned," usually uninspiring graphics) was a detriment to their proposal and led to a decision not to buy.

I attend many professional conferences and speaking events. Those individuals who present content without compelling visuals are typically evaluated lower than those that do. Using professionally rendered graphics not only increases the audience's attention, understanding, and retention of the presented material, but also tells the audience that they were important enough to warrant extensive preparation and development.

The "before" graphic (A) shown in Figure 4 would result in little to no communication. Not only does it fail to label elements clearly but is unprofessionally rendered. The "before" graphic ineffectively mixes different graphic styles (rasterized and vector images), uses font sizes that are too small, and mixes bullet and font styles. On the other hand, the "after" graphic (B) is rendered professionally. All rendering mistakes have been repaired. The graphic style is consistent, the steps are clearly labeled, bullet and font styles are consistent, and the visuals are more appealing. This information graphic is far more likely to communicate quickly and clearly.

Experienced designers know the many variables that affect the clarity of visual communication and know what needs to be considered before rendering the graphic, such as the following:

- The size of the graphic presented
- The restrictions of the RFP
- The medium on which it will be presented
- The location at which it will be presented
- The level of detail that can be communicated.

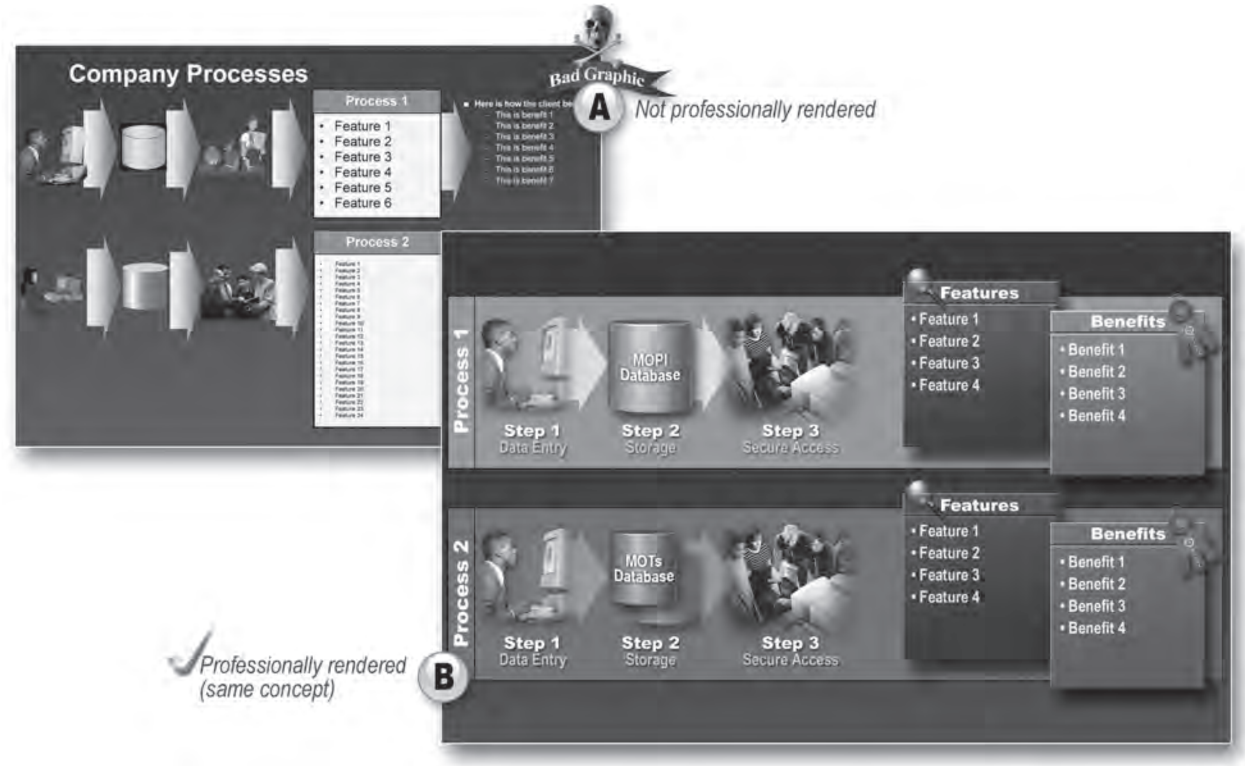

Figure 4. Professionally rendered graphics are more appealing and more likely to communicate to your audience.

> *"I make it a rule to believe only what I understand" –Disraeli*

These variables stipulate what should be included and how to render it to maximize clarity. For example, if the graphic is projected onto a 10 foot screen using Microsoft PowerPoint®, the designer must size the text so that the audience can easily read the text from a distance. If graphic elements or labels are too small, the information graphic may fail to accomplish its objective. Imagine spending thousands of dollars to conceptualize and render an information graphic only to have the audience complain that they couldn't read it.

Be sure to choose graphic styles that are consistent with the subject matter. If multiple visuals are generated, ensure visual consistency throughout. Use the same graphic and text styles, color palette, fonts, icons, symbols, capitalization, spacing, and scale throughout the presented material.

Professionally rendered graphics, if executed properly, exponentially increase the information graphic's ability to effectively communicate the right message.

Following this process and remembering the rules for conceptualizing and rendering your graphics will result in visuals that communicate the right information clearly.

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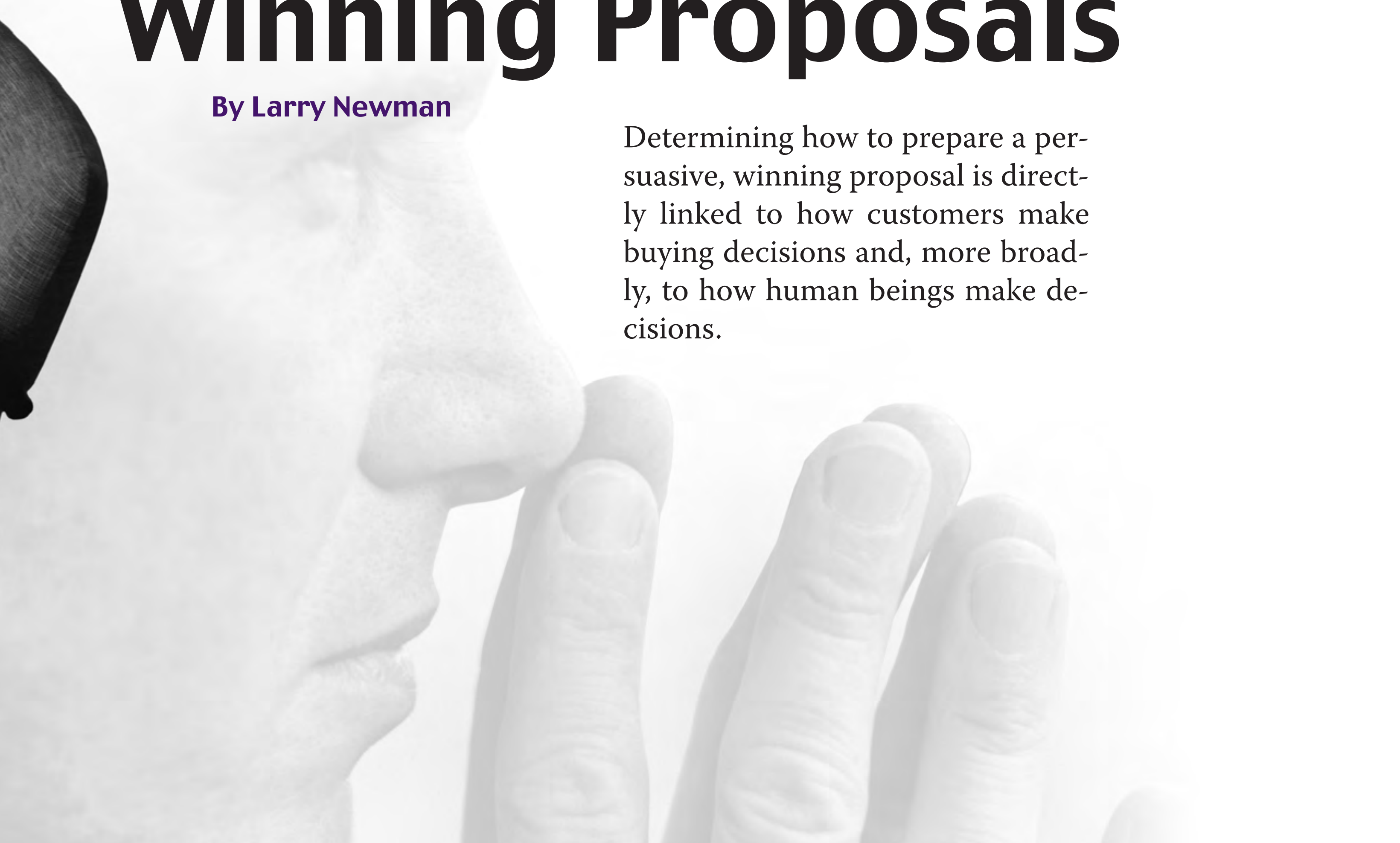
PERSUASION

Persuasion and Decision-Making: Integrating Proposal Lore in Winning Proposals

By Larry Newman

Determining how to prepare a persuasive, winning proposal is directly linked to how customers make buying decisions and, more broadly, to how human beings make decisions.



Exactly how do your prospects decide whether to select your offer or a competitor's? When you win, was the decision a reasoned, wise, logical, and calculated one? Or if a competitor wins, was it an emotional, biased, unreasonable, and even uninformed decision?

Much of the proposal and business development lore are tactical recommendations based upon practical experience. We repeatedly discuss strategy, theme statements, compliance, responsiveness, story boards, graphics, action captions, and similar topics. Yet relatively little of this lore is based upon direct, supportable, scientific research. Too many variables are involved in winning and losing complex sales to scientifically prove that a single factor change will improve win rates by *x*-percent.

Making decisions is difficult. Humans have repeatedly sought tools and processes to improve decision-making, from reading bones and tea leaves to utilizing modern, academic specialists across an array of disciplines. And yet the influence of reason, emotion, experience, training, and time remains persistent and fluid. In April, 2005, for example, a Japanese television equipment manufacturer selected an auction house to sell a $20 million art collection using the rock-paper-scissors method. For an excellent summary of the latest research on human decision-making, check out the entire January, 2006, ***Harvard Business Review*** *Special Issue*, titled*: Decision Making: Better>Faster>Smarter.*

A Japanese television equipment manufacturer selected an auction house to sell a $20 million art collection using the rock-paper-scissors method.

It is impossible to fully examine the process of decision-making without looking at the role of persuasion. The more you know about how human beings make decisions, the better you understand what is or what might be persuasive. And the more you know about what is or what might be persuasive, the better you can persuade prospects to select your organization and solution.

Technicians know *what to do*. Professionals know both *what to do* and *why*. Integrating our understanding of human decision-making with our professional lore can make us better proposal professionals.

The following excerpt on "Persuasion" is from the soon to be published 3rd Edition of the Shipley Associates' ***Proposal Guide***. First published in 2001, the expanded 3rd Edition adds 15 new topics and updates 10 other topic sections. The 3rd Edition will be available from Shipley Associates in July 2006. APMP selected the *Proposal Guide* as the primary reference for the APMP Foundation level exam.

Editor's Note: The format of this article is almost exactly the format it is appears as in the Shipley Associates' **Proposal Guide**. *Small changes in colors have been made for production purposes.*

Persuasion is fundamental to selling. Sellers use written and oral appeals to persuade prospects to accept their ideas, services, and products.

Aristotle defined a rhetorician as *someone who can see what might be persuasive*. Aristotle's rhetorician sounds like the ideal person to prepare and present oral and written proposals. However, Aristotle also said that although rhetoricians know how to be persuasive, they are not able to convince everybody.

Like a rhetorician, few sales and proposal professionals are 100 percent successful. However, applying the principles of rhetoric can make you a more persuasive writer and speaker.

The basis for persuasion is rhetoric, defined as *the art of writing or speaking effectively*. In his treatise, *Rhetoric,* Aristotle stated that persuasive writing and speaking are based on three types of appeals:

1. *Ethos* is appeal based on the reputation and character of the speaker. In written and oral proposals, reputation extends beyond the speaker to the sales team, the speaker's organization, and other sources of information about the seller. In written and oral proposals, the seller should trust the sales team and the organization that the team represents based upon prior events, the behavior of the team at the event, and the team's oral and written messages.
2. *Logos* is appeal based on reason or logic. Scholarly documents are often logos-driven. In written and oral proposals, the seller's message should be reasonable and logical.
3. *Pathos* is appeal based on emotion, specifically, the emotional state of the prospect. Advertisements are often pathos-driven. In written and oral proposals, the seller should acknowledge, and meet or address the prospect's emotional needs.

For simplicity and clarity, the terms *reputation*, *reason*, and *emotion* are used instead of *ethos*, *logos*, and *pathos*.

Persuasion is more ambitious than exposition. Exposition is to simply explain or inform. Persuaders seek a specific response: to have another party accept their ideas or agree to a specific activity, such as buying their service or product.

Business development, proposal preparation, and sales methodologies are replete with lore, a *body of knowledge held by a particular group*. This *Proposal Guide* largely comprises business development lore, but several specific guidelines are directly supported by defensible scientific research. *Guide* guidelines stem from years of practice, trial-and-error, and professional assessments of best practice across hundreds of organizations.

Persuasion is the common denominator found in most selling and business development lore. Sellers who understand the elements of persuasion can more effectively apply the lore of business development and proposal preparation. These sellers are in a better position to assess what will be persuasive in specific written and oral proposals.

Persuasion

1. **Assess the prospect's vision, motivators, and hot button issues.**
2. **Determine your next, realistically achievable objective.**
3. **Collaborate with the prospect throughout the sales process to gain information, develop rapport, validate assumptions, and assess progress.**
4. **Maintain credibility.**
5. **Use classic communication techniques to present persuasive selling points.**
6. **Align your persuasive techniques to the specific needs of individuals in the buying process and their preferred communication styles.**

Each seller's goal is to persuade a prospect to decide either to purchase the seller's solution or to agree to take the next step in the sales process. Hence, research on how people make decisions is highly relevant. Both contextual and psychological constraints affect buyers' decision making. While decision-making theory is fluid and research is ongoing, some reliable key points are:

- **A human's ability to make a purely logical decision is limited.**

  Complex circumstances, limited time, imperfect data, and an inadequate ability to analyze the data form a decision-maker's state of *bounded rationality*.

- **Every decision involves reason and emotion.**

  Research with brain-damaged patients shows that when logic is cut off from emotion, patients could not make decisions. PET (positron emission tomography) and fMRI (functional magnetic resonance imaging) scans show that all decisions involve a complex interplay between the emotional and logical centers of the human brain.

- **Humans knowingly make unreasonable decisions.**

  Individuals in controlled experiments and real life situations will ignore their economic best interest (reason) and make decisions for emotional reasons (anger, revenge, immediate gratification, irrational fear, risk avoiding, or risk seeking). Essentially, the emotional sector of the brain overrides the reasoning sector.

Which type of appeal is most effective? Aristotle said reputation was the most effective appeal, based upon trust in the credibility of the speaker. Advertisers rely heavily on appeals to the emotions of the prospect, but use credible speakers to deliver the message. Most sellers make "reasonable" arguments, even though their arguments might not withstand the scrutiny of the prospect or a logician.

Reputation, reason, and emotion are all essential persuasive elements in crafting complex sales arguments. Like a three-legged stool that is unstable with a single leg removed, you are far less likely to make the sale if you omit any element.

All techniques recommended in this *Proposal Guide* are rhetorical devices originating in Aristotle's three types of appeals. The guidelines in this section integrate the research on what is persuasive with the lore of selling and proposals. Fortunately, if you are an experienced proposal writer you have probably been using many of these techniques. Ideally, you will become a rhetorician skilled at blending reputation, reason, and emotion in an integrated appeal that might be more persuasive.

1 Assess the prospect's vision, motivators, and hot button issues.

NOTE: Most motivators are directly linked to reason. However, the individuals' identifying motivators are often influenced by their personal emotional needs.

Similarly, organizational motivators drive organizations; personal motivators drive individuals who make or influence purchasing decisions.

See **Features, Advantages, and Benefits** *and* **Strategy.**

Start with the premise that people seek benefits based on two factors:

- *Perception:* whether it is good or bad
- *Possession*: whether we have it or not

Buyers seek one of four types of benefits derived from perception or possession as illustrated in figure 1, and sellers promise benefits in exchange for money or power. Sellers must link their solution to the prospect's needs.

Effective sellers begin by analyzing prospect needs, and by determining their organizational *vision*, *motivators*, and *hot button issues*.

Vision refers to the prospect's organizational image of what the future will or could be like. Sellers that clearly demonstrate how their solutions will help prospects achieve their vision usually win the sale. Note how this vision statement powerfully appeals to reason and emotion:

> **Imagine:** doctors operating on a patient can point a RxT laser at live tissue, analyze the reflected light with a spectroscope and PC, and immediately determine if the tissue is malignant or benign. Further imagine that this scenario can be made real within 16 months if you fund our program.

Issues are the prospect's concerns—the worry items that keep the prospect's managers awake at night. To address issues effectively, determine the source. Is this an issue because the prospect does not trust you or your organization, because the prospect cannot see a logical reason to purchase or cannot see how to justify the purchase, or because the prospect has an emotional need?

The prospect's issues typically become motivators:

- Improve profits
- Increase sales
- Reduce costs
- Improve safety
- Reduce risk
- Improve quality
- Increase productivity

All motivators are issues, but not all issues are motivators. In complex sales, most motivators usually stem from reason and are logical.

Hot button issues are a consolidated subset of issues and motivators. Typical hot button issues are owned and repeatedly cited by several people in the prospect organization. Since hot button issues often relate to reputation, reason, and emotion, address them by incorporating all three types of appeals.

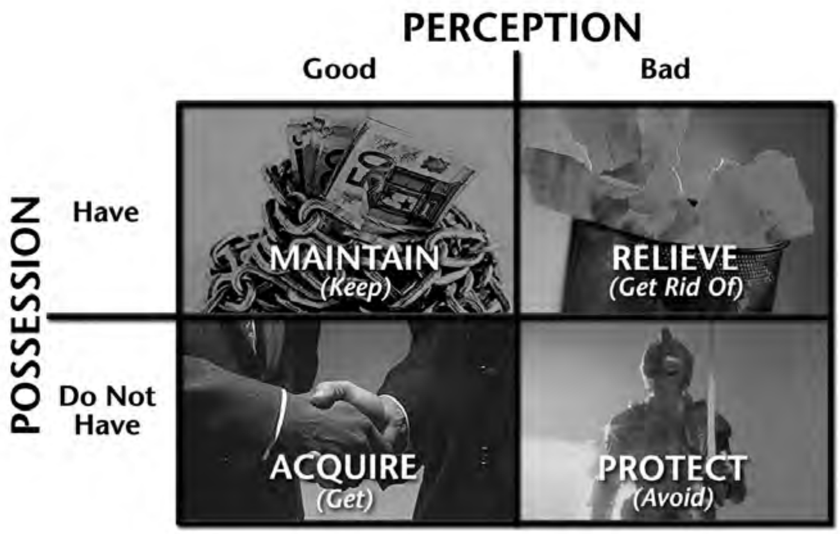


Figure 1. Buyers Seek Four-Types of Benefits. *Buyers' motivations rely on their perceptions of good, bad, and possession. The four possible combinations are:* ***1) Maintain:*** *Keep the good;* ***2) Acquire:*** *Get the good;* ***3) Relieve:*** *Get rid of the bad;* ***4) Protect:*** *Avoid the bad.*

2 Define your next, realistically achievable objective.

See **Sales Letters**.

Prospects become customers via a consistent, cyclical process:

- *Operating* in their normal environment. In normal environments, things age, wear, and decay; prospects needs evolve.
- *Assessing need.* Prospects perceive a need or opportunity to improve and then determine if they really have a problem/opportunity.
- *Valuing solutions.* Determining which, if any, solution offers the best value.
- *Resolving remaining issues* with the solution that offers the best value.
- *Purchasing.*
- *Implementing the solution.*
- *Operating* in their normal environment.

Persuasion can be applied at every phase.

To advance the sale, determine where prospects are in the process. Find answers to their questions, and then state your next, realistically achievable objective. *Exactly what would you like this prospect to agree to do next?*

Before attempting to persuade prospects to take action, test your readiness by asking three things:

1. Where are they going? *(Vision, objective, or goal)*
2. What is their next realistically achievable step towards that goal? *(Advance complex sales in a series of steps.)*
3. Why is it in their best interest to agree to take the next step? *(Motivators, hot button issues)*

Advance at the prospect's pace; pushing the pace in a complex sale alienates the prospect. Perhaps the only tactic sellers can effectively use to increase the pace is to note the opportunity cost as the prospect delays implementing improvements.

Determine what credible combination of reason and emotion will address prospects' underlying issues. If you misjudge prospects' issues at this point in their purchase-decision process or cannot adequately answer their questions, you risk not advancing, delaying the purchase, or losing the sale.

Examples of not seeking to advance the sale and advancing too fast:

Not seeking to advance the sale

> *Thank you for agreeing to meet with me today. Should you have any questions in the future, please do not hesitate to call.*

Advancing too fast

Thank you for agreeing to meet with me today. We offer the best environmental remediation services available in North America. Can I have your purchase order today so that we can reserve a place in our June work schedule?

State sales objectives clearly so they will be easy to assess. If sales objectives are vague, no one can tell when or if they are met.

Examples of next, realistically achievable objectives:

- Agree to tour a site where your system is operating, preferably Wednesday, December 4, at 10:00 AM.
- Agree to collect and share their engine design specifications and productions costs, sending them to U.S. via courier by 4 PM, September 30.
- Agree to meet Thursday, 8 a.m., to review and approve final drawings and specifications.
- Agree to consider a change order, adding construction management services to our ongoing design contract.

Vague sales objective

I plan to meet with the prospect to better understand their future needs.

This objective leaves many details unattended. When is the meeting? How many meetings will it take and who will attend? What understanding is sufficient? Where is this going?

The generic sales cycle illustrated in figure 2 illustrates sales phases (linked arrows) and tactical steps (boxes) a seller might take to advance a sale. Whether a meeting, phone call, or document, the objective for each tactical step is to incrementally advance the sale.

Figure 2. Sales Cycle, Tactical Steps, and Sales Objectives. *Each tactical step has a specific, measurable, realistically achievable, sales objective.*

3

Collaborate with the prospect throughout the sales process to gain information, develop rapport, validate assumptions, and assess progress.

See **Strategy.**

Collaboration is persuasive because it integrates appeals based on reason, emotion, and reputation. While most collaborative discussions are based on reason, both parties disclose emotional needs. Prospects willingly share information in a collaborative situation. Collaboration builds trust and credibility; ongoing collaboration nurtures this emotional bond. Ultimately, prospects prefer purchasing from people they like.

Complex sales involve buying and selling teams, extended buying cycles, and multiple meetings. Needs, issues, facts, and assumptions evolve. Collaborative sellers repeatedly validate assumptions (reason and emotional needs) while building credibility. In complex sales, few prospects know exactly what they want at the onset.

As the sale advances, prospects' implicit needs become explicit, and sellers can directly address these explicit needs.

Use your collaborative relationship to validate your solution before finalizing your proposal. Solutions that have been validated by the prospect win more frequently.

4

NOTE: Prospects readily accept negative seller admissions as truth. Use this to your advantage by admitting a weakness that you can mitigate. Your subsequent assertions will be more credible.

See **Oral Proposals** *and* **Presentations to Prospects.**

Maintain credibility.

Sales professionals are rightfully adamant about maintaining their personal credibility with prospects. The seller's credibility extends to the sales team, the seller's organization, and other sources of information about the seller. Maintain credibility by adhering to established ethical standards, introducing appropriate authority figures, substantiating claims, and staying on message.

Prospects must trust what you say and recommend. In addition, many prospect organizations have mandatory ethical standards. For example, the U.S. Government requires all sellers to maintain ethical standards established in the Sarbanes-Oxley Act, requiring audited compliance to compete for U.S. Federal contracts.

Sellers present themselves as either authority figures or friends. Authority figures are experts, endorsers, users, developers, managers, or owners of the product or service. Friends are people the prospect likes, identifies with, or wants to emulate. Sales professionals usually present themselves as friends, and then introduce authority figures to answer questions, discuss solution details, and substantiate claims.

NOTE: Prospects are most likely to believe anything negative the seller says about his/her product or service. Therefore, admitting and addressing a weakness usually increases your credibility.

When introducing authority figures to substantiate your claims, consider their credibility with the prospect and what this prospect knows or believes they know about your organization. Prospects rate the credibility of sources in this order:

1. What they know/believe
2. What similar, trusted customers say
3. What independent sources say
4. What you say
5. What competitors say

Improve your credibility and persuasiveness by increasing the percentage of substantiation from the first three sources. Too many sellers rely on the fourth-level source, themselves.

Messages from all sources must be aligned throughout the sales cycle. Political campaign strategists repeatedly counsel, *stay on message*. Misaligned, inconsistent messages reduce credibility. Once lost, credibility is difficult to regain.

If prospects doubt your credibility, they assess the non-verbal conversation elements, as summarized in figure 3. Skeptical prospects focus on how you talk and what you do, noticing your body language and actions or behaviors.

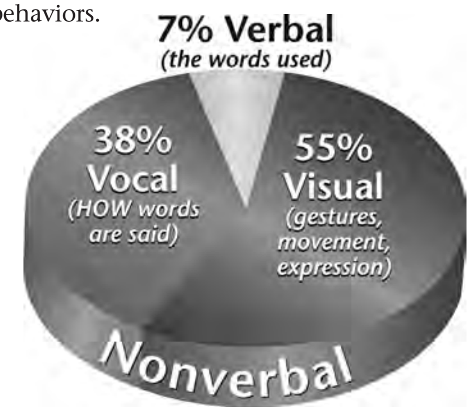


Figure 3. Importance of Nonverbal Communication. *Research by Dr. Albert Mehrabian at UCLA demonstrated that as much as 93 percent of the emotional content of a message is conveyed by visual and vocal cues.*

5

Use classic communication techniques to present persuasive selling points.

Persuasive sellers communicate their key selling points using these key techniques:

- Repetition
- Association
- Composition
- Selection
- Redirection
- Ghosting

NOTE: Repetition integrates credibility, reason, and emotion. Trusted sellers keep their word and present a logical, consistent message. Treating buyers consistently satisfies their emotional needs for improved efficiency and reduced stress.

Repetition is an easy, simple, and efficient persuasive technique. The more times we consistently see, hear, and experience something, the more we remember it. Repeated statements, experiences, and actions prompt us to identify with the statement or action unless we have already accepted a conflicting position.

Humans embrace repeated behaviors (habits) because they meet a near-universal emotional need for reduced stress and improved efficiency.

A decision that is repeated is really a decision that does not need to be made. Repetitive decisions save time and reduce stress. Note how people tend to sit in the same seat in a classroom, select the same item at a restaurant, and buy the same product. Once a decision about an item or circumstance is made, it is easier to repeat it than risk a new decision.

Here are some of the ways we use repetition in business development:

- Make similar statements throughout the sales cycle.
- Make identical statements in sales presentations and the subsequent proposal.
- Summarize at all levels of a proposal.
- Echo common themes in each proposal volume.

NOTE: Use consistent terminology. Using synonyms to make your proposal more varied and interesting usually confuses your prospect.

- Carry similar statements through headings, theme statements, action captions, and body text.
- Repeat key body text in margin callouts.
- Repeat introductions in subsequent subheadings.

In a presentation or proposal, restate points from a subtly different perspective.

Your prospect is interested in a low cost solution. You repeatedly emphasize how cost influenced your solution design.

Technical section: *To minimize the cost, we selected commercial off-the-shelf components whenever available.*

Management section: *Our relatively flat organization and increased span of control per key position is specifically designed to reduce overhead burden.*

Task management section: *A team leader, who is a working member of the team, manages each task order. To minimize management cost, we only appoint full time project managers when teams exceed 12 people.*

Deliberate, word-for-word repetition can be reassuring or insulting depending upon how it is done. The following example is reassuring:

You must answer identical questions repeated in two places in the bid request. Answer the question fully the first time it is asked. When the question is repeated, state whether you have repeated or cross-referenced your answer:

Repeat

This question was also asked in Section 3.2. We have repeated our answer here for your convenience.

Cross reference

This question was also asked in Section 3.2. We have summarized our answer here. For the full answer, please turn to Section 3.2.

Association, the second persuasive technique, is linking your strengths to something positive that prospects already like or want, or to something negative that prospects want to eliminate or avoid. Successful association relies upon prior guidelines 1 and 3. Assess what prospects desire or want to avoid, and reassess through collaboration with the prospect.

Association is primarily an emotion- and reason-based appeal. Similar, positive associations are comforting and supportive. Knowing that others have achieved similar positive outcomes is also logically appealing.

Associations are direct or indirect. Direct associations link prospect requirements to outcomes in theme statements, informative headings, section summaries, tables, body text, slides, and assertions in presentations. Most of these associations directly and explicitly link prospect issues and requirements to features of your solution.

Association fails when prospects fail to see the link. While often unstated, these prospects are thinking: *Sounds good, but I do not see why I need the other approaches*. Or, *Sounds pretty much like the all the other approaches.*

Indirect associations are subtle suggestions tailored for a specific prospect. Sellers use pictures, graphics, metaphoric language, allusions, backgrounds, and contexts, as illustrated in figure 4.

Word choice also has a subtle, persuasive impact. Choose words and phrases familiar to the prospect.

Selling IT services to an engineer

I've analyzed your IT systems and think you should consider re-engineering your network. My calculations show that delays have increased 23.6 percent. After you review my calculations, I'm sure you'll agree.

Selling IT services to a banker

I've analyzed your IT systems and think that we can make your network as secure as your vault. I've estimated the revenue enhancements and cost savings, noting that the complete change is revenue-neutral within 2 years.

TYPE OF INDIRECT ASSOCIATION	EXAMPLE(S)
Metaphoric language	To enable pilots to perform at their best throughout long, grueling missions, our ergonomically designed, adaptable seats can be pilot-tuned to simulate their favorite lounger.
Allusion	While no one can promise zero risk, your retirement nest egg is invested in U.S. Treasury notes that are as secure as Fort Knox.
Background	Throughout 6 weeks of collaborative exchanges, your senior managers have emphasized that the ideal solution must be 100-percent compatible with the Easy-Link™ software that we installed in 2002. Easy Link II™ is backwards compatible.
Context	With the end of the Cold War and increasing threats from rogue states, the Royal Navy is increasingly concerned about protecting the fleet in brown water. Nearly 80 percent of our I.R.&D. investment since 2000 has focused on countering this threat.

Figure 4. Using Indirect Associations to Persuade. *Subtly persuade prospects by indirectly associating features of your solution to the benefits sought by the prospect.*

NOTE: Composition incorporates emotion-, reason-, and reputation-based appeals. Emotion is often the most powerful element.

See **Acronyms, Active and Passive, Clichés, Customer Focus, False Subjects, Gobbledygook, Jargon, Organization, Page and Document Design, Redundant Words**, *and* **Style and Tone.**

Selling IT services to an architect

I've analyzed your IT systems and see some need to change the structure of your network. I've sketched a few ideas that will give you a better foundation to sharpen your firm's network design. As you review the blueprint, The seller mirrors language each person uses routinely in their work. Subtle but effective.

Composition, the third persuasive technique, is the manner in which parts of speech and writing are combined to form the message. Composition includes the following elements:

- Verbal (the choice of words)
- Nonverbal
- Visual elements (color, shape, and size)
- Aural elements (music, sounds)
- Mathematics (quantities, relationships)
- Time
- Space
- Smell

Composition incorporates appeals based upon reputation, reason, and emotion. For example, consider your home-shopping experiences. Did you consider reputation of the community, neighborhood, realtor, builder, and owner? Did you reason why a certain home was a better value than the alternatives? Did a home or apartment have curb appeal, feel good, smell good (or bad), and evoke strong memories and emotions? These are all examples of being influenced by elements of composition.

Sellers routinely apply elements of composition to oral and written proposals. In many competitions, your first priority is to gain the evaluators' attention and retain it long enough to convince them you offer the best solution. Consider these varied examples illustrating how various elements of composition have been used in proposals:

- Sellers commonly use words, terms, phrases, and acronyms that their prospects use.
- In oral proposals, sellers rehearse extensively to prevent nonverbal elements from conflicting with verbal elements.
- In a competition to sell telecommunications services to Pet Smart, one competitor created a strong, positive stir by submitting their proposal in the prospect's branded pet carrier emblazoned with "Caution! Live proposal. Handle with care."
- In a UK competition, one bidder increased the graphical content of their executive summary to nearly 80 percent because the decision maker was dyslexic.
- Sellers are increasingly using audio and video components in sales presentations and embedding links in sales documents to similar on-line presentations.
- Many sellers prepare quantified value propositions, and most proposals attempt to quantify the value of their solution versus the existing approach or alternative solutions. Many proposals describe the results from trade studies.
- Both time and space are important elements in sales presentations. Persuasive sellers consider length, timing, transitions, room structure, visual aids, and positioning of sellers versus the prospects as a few examples.
- While "scratch and sniff" proposals might not have been used in business, publishers insert perfume cards magazines and catalogs, and new car scent is sold in aerosol cans.

Many of the sections in this *Proposal Guide* relate to elements of composition. Figure 5 links some of these *Proposal Guide* topics and summarizes one or two key points.

TOPIC	EXAMPLE OF GOOD/POOR USE IN PROPOSALS
Active vs. Passive Verbs	Passive verbs obscure actor; suggests lack of ownership or responsibility for the result. Correct choice depends on your strategy.
Abbreviations	Acceptable when known; confusing and potentially arrogant when unknown.
Clichés	Noticeable use suggests lack of thought and perhaps outdated knowledge.
Choosing Correct Words	Incorrect choice suggests broader incompetence, poor quality.
Customer Focus	Naming prospects before sellers, placing benefits before features, naming prospects more often than sellers, etc., increases customer focus. Suggests seller understands prospect's needs.
False Subjects	Less clear, forces busy prospects to reread, obscures key points.
Gobbledygook	Obscures meaning; suggests seller is difficult to work with.
Jargon	Must balance between suggesting seller is knowledgeable (insider) vs. arrogant and difficult to understand; impact is prospect dependant.
Organization	Organize according to readers' interests, summarize at all levels; announce and then follow your organization. Suggests seller is competent, clear, deliberate, and thoughtful.
Redundant Words	Acceptable for occasional emphasis, otherwise, cumbersome. Overuse suggests seller is vain, braggart, inefficient, or exaggerating.
Style and Tone	Style choices are a subset of composition; tone is the impact on the prospect, whether or not it is persuasive.

Figure 5. Composition Is a Key Persuasive Element. *Successful, persuasive oral and written communication reflects excellent composition and the recommendations in this Proposal Guide.*

Sellers instinctively downplay their weaknesses, and potentially mitigate competitors' strengths, through selection, redirection, and ghosting. Clear, persuasive communicators always place the most important points to the prospect first in a document or presentation. Position infers importance.

Selection, the fourth persuasive technique, is forced on us by the linear nature of communication. Selection forces two decisions on a seller:

- Include or omit
- Order or position

Your reputation is destroyed when prospects discover a deliberate omission.

NOTE: Unethical sellers that deliberately use omission tactics generally follow a four-step pattern:

1. Omit the information
2. Deny if discovered, saying:

   There is nothing wrong with it. (Deny it is bad.)

   We did not cause this. (Deny responsibility.)

   We did not mean it. (Deny intent.)
3. Minimize the harm, saying: *It won't matter . . . only a few people were involved . . . that seldom happens . . .it could have been much worse.*
4. Divert attention, saying: *You were extremely lucky that xxx didn't happen . . . this gives us the opportunity to . . . I was more concerned about . . . Did you hear what happened to . . .*

Prospects often limit the time that they will spend with sellers, the page length of proposals, and the time for sales and oral proposal presentations. In the limited time and space available, what will you say? Your decision to say one thing forces you to omit saying something else or saying it later. Hence, all communication is limited, and arguably slanted, or biased to include or exclude items.

Most decisions to include or omit information are not harmful or deceptive. For example, the late development of a new product would probably not affect your ability to support an unrelated, existing product. Your recent decision to hire 15 software engineers to develop a new application would probably not affect your ability to deliver outsourcing services.

Selection can involve ethical considerations. Unethical selection can be a deliberate, calculated, strategy of silence, usually to downplay weaknesses. Unethical sellers deliberately conceal by selection, but the separation between ethical and unethical is narrow.

Consider the difference between proof, in a probabilistic sense, and support for sales assertions:

This prospect is concerned about completing the project on schedule. You must promise to complete it on time as a bid requirement. A proof statement, assuming a similar probability of on-time completion, would be:

> We completed 8 of 10 similar distribution centers on time, as listed in figure 1.

A support statement, offering evidence that on-time completion is possible, would be:

> Global Computers needed to complete a similar distribution center in the same, 6-month period. After a brief oral proposal process, they selected Shipley Constructors. We completed the distribution center 2 weeks ahead of schedule and were cited as Global's Star Vendor for 20XX.

Would this statement be unethical if the Global distribution center was the only project Shipley Constructors completed on time?

Taking quotes out of context is a form of selection. At what point is a quote about your organization's excellent performance no longer relevant? Is it relevant 6 weeks, 6 months, or 6 years after the customer said it? If that same customer is now displeased with your organization due to another event, is the original quote still true because it was true when they said it? Must you disclose the unconnected event? How would your immediate prospect react if they contacted this reference?

Half-truths are statements that deliberately omit facts or information necessary for a full description or account. Half-truths are unethical and might be illegal, depending largely on the speaker's intent. For example, many statements in ads are true, but incomplete.

To limit deliberate half-truths and lies, governments enact disclosure laws, requiring sellers to disclose certain information, or certify that they comply with other legal requirements. For example, the U.S. Government requires sellers to disclose full cost and pricing data and reserves the right to subsequently adjust payments if insufficient data was disclosed. Deliberate omission of relevant cost and pricing data is fraud, a criminal offense.

Here are some questions to ask to help you determine if a selection decision is unethical:

- What are the potential consequences of the omission?
- Would discovery reflect unfavorably on how prospects view you or your organization?
- Would discovery affect their decision on this purchase?
- Would publishing this omission in the newspaper embarrass you or your organization?

The order of presentation is an important selection element of persuasion. Readers predominantly associate order with importance. The first item presented is most important, and following items are presented in decreasing order of importance. If you intentionally adopt a different convention, explain your decision to avoid misleading the prospect.

Key proposal guidelines relating to order are summarized below:

- Order points in decreasing order of importance from this prospect's perspective. For example, cite benefits before features.
- When items are of equal importance, say so.

- Announce your order, and then stick with it unless redirected by the prospect.
- When reusing material, reorder your points for this prospect. Omit non-relevant points.
- When compelled to discuss bad news, open with a positive point.
- Begin presentations with an attention-getting statement you can support in your presentation.
- In presentations, consider using your most powerful point for a memorable close if you are sure the audience will be present and attentive throughout.

Redirection, the fifth persuasive technique, is the tactic of shifting attention to other points. Prospects usually want a range of features. A common ethical redirection is to counter a weakness in one area with an offsetting strength in another area.

For example, a customer requested a search and rescue helicopter that could meet the following requirements:

- 250 mile search range
- 2 hour loiter time over the search area
- Winch 15 survivors from the water
- Maintain 1 hour reserve fuel capacity

The positive response follows:

See **Strategy.**

Our aircraft can maintain all required search parameters and successfully winch 8 survivors from the water. However, if the search range is reduced from 250 to 225 miles, we can maintain all other search parameters AND successfully winch 15 survivors from the water.

Another common and ethical redirection is to offset a performance shortfall (weakness) with lower cost (strength), or vice versa. Here is an example in proposal text:

Our firm, fixed-price construction cost is $10,000 greater than the target cost in your bid request. However, our fast-track construction approach enables you to move-in 2 months ahead of schedule, saving $10,000 in rent at $5000 per month.

Humor and collaboration can be ethical redirection tactics. We all use humor to defuse tense situations, relax people, and build rapport. Skilled sellers occasionally use humor in sales presentations, once they have established an acceptable relationship. Upon entering potentially contentious negotiations, a seller stated: *Don't you just hate this part?*, thus defusing some of the tension and perhaps personal animosity.

Collaboratively involving prospects in determining the solution to a problem diverts attention from: *What is wrong?*, to: *What do we agree will make it right?* Customer service representatives are routinely taught to use questions like What would you like me to do to fix this problem? They are using collaboration to redirect the customer from unproductive venting to productive problem solving.

Sellers routinely redirect prospects' focus from price to value by collaboratively developing a quantified value proposition. Once prospects quantify the added value of the improved solution and the opportunity cost of delays, the outright price or price differential versus the alternatives becomes less important.

Unethical redirection tactics usually intensify unrelated or trivial side issues. Traditional names for these redirection tactics are *bait-and-switch, hairsplitting, red herring, busy work, legal harassment, loophole,* and *cosmetic difference*. Attacking the messenger is a second unethical redirection tactic, where the credibility of the messenger is questioned.

A third redirection tactic is to rename the problem. *Taxes* become *revenue enhancers*; *deficits* become *revenue shortfalls*, *power failure* becomes *current interruption*, *problems* become *challenges*, and *change orders* become *opportunities for further enhancements*. The term *spin* is a redirection tactic, where the speaker or writer attempts to create a favorable (or unfavorable) impression. Exactly when ethical spin becomes unethical is a difficult judgment that rests on the user's intent and the impact on the prospect.

Ghosting, the sixth persuasive technique, is calling attention to unnamed competitors' weaknesses by highlighting the importance of, or differences between, alternative approaches or solutions. Whether emphasizing your strengths or highlighting competitors' weaknesses, the following ghosting tactic is the same:

Emphasizing a seller's strength (excellent safety record)

With our lost-time-accident rate less than one-half the Montata state average, construction can continue on schedule.

Highlighting a competitor's weakness (poor safety record)

Our safety record is better than any other Montana contractor. With our lost-time-accident rate less than one-half the second-place contractor, construction can continue on schedule.

Ghosting and trade-off analysis are similar. Trade-off analysis is simply discussing your analysis of alternative approaches, and then noting why one alternative was selected and the others were rejected. The most sophisticated trade-off analyses bound the alternatives, noting the conditions where the preferred alternative changes. When one of the rejected alternatives is that same as a competitor's approach, you have ghosted or cast doubt on that competitor's approach.

The following example illustrates how ghosting was used ethically to win a recompete:

> The incumbent operator of a medical laboratory for a large, government agency was seeking a third, 5-year contract. Competitors' complaints about favoritism towards the incumbent prompted the contracting officer to limit proposals to 100 pages to neutralize the incumbent's advantage. The incumbent's strategy was to convince the customer that managing this complex laboratory was too risky to shift to a new operator. Their tactical approach was to use detailed graphics to depict all processes. Their proposal comprised 80 percent process diagrams and procedures. The alarmed customer retained the incumbent.

6 Align your persuasive techniques to the specific needs of individuals in the buying process and their preferred communication styles.

Complex buying decisions are made by buying committees. The individuals on buying committees assume the five, classic decision-making roles are described in figure 6. Individuals in each role have typical needs or issues in their decision-making role, also listed in figure 6.

Sellers that are aligned with their prospects are meeting the individual business and emotional needs of each person on the buying committee. Not only do sellers supply prospects with the business information that they need when they need it, but sellers also recognize and address prospects' emotional needs. Staying aligned becomes more challenging when you consider that the needs of individuals on the buying committee change over the buying cycle.

Individuals have different preferences in how they take in information. Educators classify learning styles as visual, auditory, and tactile/kinesthetic.

Visual learners learn through seeing. Visual learners need to see the teacher's body language and facial expression. They often think in pictures, learn best from visuals, and take detailed notes to absorb the information.

Auditory learners learn through listening. They prefer lectures, discussions, talking things through, and listening to what others have to say. Auditory learners interpret the nuances of nonverbal speech, such as tone, pitch, and speed. Written information is less accessible until it is heard.

Tactile/kinesthetic learners, a much smaller segment, learn by moving, doing and touching. They are hands-on people. They often find it hard to sit still for long periods and may become distracted by their need for activity and exploration.

Most adults develop the ability to take-in visual, auditory, and tactile/kinesthetic information, but we retain preferences. We all can cite colleagues who tend to be visual, verbal, or tactile/kinesthetic. While well beyond the purpose of this *Guide*, sellers that adapt their style of communication to meet the needs of specific prospects will be more persuasive. Most sellers sense when they "click" with prospects but might not recognize why they clicked.

While useful to recognize these individual differences, the usefulness and reliability of this approach is limited in complex sales:

- Few sellers can accurately and reliably "read" a prospect's preferred communication style. Most adults have learned instinctive adaptations, but have difficulty consciously adapting their communication styles.
- Most sales presentations and documents are prepared for a buying committee. Even when documents are prepared for one individual, these documents might be forwarded to others in the buying organization for comment or approval.

Hence, follow the persuasive communications guidelines suggested throughout this *Guide*. Integrate **visual**, **verbal**, and **tactile** elements in reasonable, credible, and emotion-based appeals.

DECISION-MAKING ROLE	DESCRIPTION OF ROLE	COMMON NEEDS
Recommender	Gather data, prepare specifications and bid request, manage the evaluation process, prepare oral/written recommendation. Must build buy-in towards a consensus decision. U.S. Federal example: Source Selection Evaluation Board Chair or end user.	Enough data but not too much; quantitative justification for what might be an emotional decision; timely responses to meet procurement deadlines.
Approver	Have the power to veto the recommendation, whether formal or informal. Their veto can prompt a modification of the request or escalation to the "Decider." Often technical, legal, contracts, finance, or a consultant. Could be approver due to personal relationship with decider or user. U.S. Federal example: Contracting Officer (CO), CO Technical Representative (COTR), or other purchasing official.	Enough data to satisfy "technical" information needs. Credible reputation with fellow specialists. Bidder demonstrates understanding of the importance of specialists' disciplines. Meets specialist requirements & regulations.
Influencer	Asked for their opinion because they are involved in implementation. Strong influence but no veto power. U.S. Federal example: CO Technical Representative (COTR), or Small/Minority/Disadvantaged business representative.	Bidder acknowledges importance of that person's role and importance; spurned influencers work to undermine offending sellers.
Decider	Formal approver; accountable for the decision; power to commit organization. Some organizations require a consensus. U.S. Federal example: Source Selection Authority.	Compatibility with organizational vision, decision rules, direction, and other initiatives. Evidence of commitment & risk sharing. Acceptable, manageable risk. Accessible, responsible counterpart identified in selling organization.
Implementer	Must implement, execute, use or operate solution. Could also be the recommender.	Past performance. Reputation of seller with colleagues. Specific measurable milestones, transition plan, training plan. Credibility, reputation, and experience of key individuals committed by seller.

Figure 6. Buying-Decision Roles. *When determining what might be persuasive to individuals on the buying committee, consider their roles in the buying decision. Each role might include multiple individuals and some individuals might have multiple roles.*

Larry Newman is a Shipley Vice President, partner, and author of the *Proposal Guide*. Mr. Newman has 20 years of proposal consulting and training experience in US Federal, non-Federal, and international markets, and has presented at numerous national and regional APMP conferences. He can be reached at lnewman@shipleywins.com.

Book Review

The Booklover's Guide to New Orleans by Susan Larson; Lousiana State University Press; 1999; Retail Price: $38.95

by Ali Paskun

Residents of every major city can claim a famous literary figure as theirs primarily because that author's works celebrates and promotes the personality of the city. Can anyone deny that Margaret Mitchell will always be synonymous with Atlanta? However, there are also always aspects of this rich history that few but the local residents may be aware of. For instance, most people know of the association between Edgar Allen Poe and my own hometown of Baltimore, MD. However, not many people know that the ashes of Dorothy Parker at buried in a memorial garden outside the NAACP headquarters building not far from the Poe House.

> *Even If you aren't a booklover, you will find some little something in this guidebook to bring a little extra Cajun spice to your stay.*

Such I have found is the same for New Orleans. Anne Rice has done much in recent decades to familiarize millions of readers with the Garden District and other locations around the city. But there is more to New Orleans than vampires and witches, and *The Booklover's Guide to New Orleans* has it all!

This fact-filled resource is a treasure trove of information on the literary history of New Orleans. It not only includes the more famous, such as a discussion of Tennesses Williams' *A Streetcar Named Desire*, but the lesser known such as the fact that William Sydney Porter (O. Henry) hid on Bienville Street while running from charges of embezzlement. While it is a guidebook of historical antecdotes of the many writers, poets, playwrights, and others associated with New Orleans over the years, it shares other connections they have to the Crescent City. Larson describes where these various literary figures lived, hung out, even where they are buried. She delves into what they wrote while in New Orleans, and how the city influenced them.

Bu this is a "booklover's guide," correct? Well, no bibliophile would be content with just learning that F. Scott Fitzgerald once rented rooms on Prytania Street in 1920 and didn't care for the city while he was there. Larson doesn't disappoint. Her guide is replete with a list of local bookstores; a reading list of New Orleans-related titles across genres including children's books, cookbooks, and folklore; resources such a libraries, literary agencies, publications, and literary societies; and festivals. Ah, the festivals! Who couldn't love a "Stella and Stanley Shouting Contest" as part of The Tennessee Williams/New Orleans Litereary Festival?

And, of course, this book is about New Orleans. In keeping with Louisiana tradition, there is even a chapter of "Lagniappe," a sometimes quirky hodge-podge of well-known authors' picks. Included are Doug Brinkley's History Highlights, Tony Dunbar's Gourmet Guide, and Robert Olen Butler and Elizabeth Dewberry's Recommended Romance.

I hope when you attend the Annual Conference this May, you will allow Larson to guide through a lesser-known side of New Orleans. Even if you aren't a booklover (perish the thought!), you will find some little something in this guidebook to bring a little extra Cajun spice to your stay.

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

2005 Recipients Presented June 8, 2005
Phoenix, Arizona

Mark Ciamarra
Dana Spears

APMP: Sixteen Years of Promoting Our Profession (Part II)

The Conferences

by Ali Paskun and John Elder

17th Annual Conference and Exhibits Brochure.

John Elder has been with CACI International Inc. in Arlington, VA since 1998 and is currently the Presentations and Proposal Production Manager. Prior to joining CACI, he worked as a Proposal Coordinator for five years. Mr. Elder currently serves as Managing Editor of the *Journal of the Association of Proposal Management Professionals*. He holds a BA in English and an MA in Journalism from the University of South Carolina. He can be contacted at jelder@caci.com.

Ali Paskun has extensive proposal experience working as a coordinator, writer, editor, and manager. She currently is the Director of Proposal Operations at DRS Technical and Management Services Corporation (TAMSCO) in Calverton, MD. Ms. Paskun is the Books Editor for the *Journal of the Association of Proposal Management Professionals* and serves on the APMP Board of Directors as Government Liaison. She holds a BS in Communications from the University of Maryland, University College. She can be contacted at apaskun@tamsco.com.

"Establishing The Proposal Center." "Training The Proposal Team." "Using Professional Proposal Consultants Effectively." "What Needs To Be Done To Make Proposal Management A Recognized Profession." While these titles may sound like agenda items for the upcoming APMP Annual Conference in New Orleans, they are actually presentations that were given at the very first National Conference at the Hyatt Islandia in San Diego, California, May 10-11, 1990. In all, 12 sessions were held at that initial two-day gathering, attended by 135 proposal professionals. This year, more than 50 presentations will be available to attendees during the four-day conclave. Now, as then, they will address the current and continuing challenges in new business acquisition.

The Annual Conference and Exhibits has been a staple of APMP since it's inception. Over the past 16 years, members have met in nine different states, plus Washington, DC, to, as Tom Boren noted at that very first conference, "assess the current state-of-the-art in

1st Annual APMP Conference
May 10-11, 1990

There was no overall theme ... a one-day program on a variety of proposal topics

Hyatt Islandia, San Diego, CA

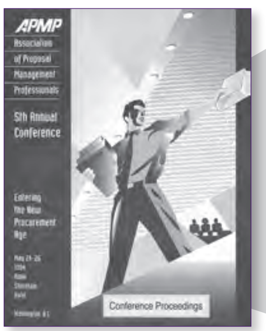
Conference Chair: George McCulley and the APMP Program Committee

2nd Annual APMP Conference
May 15-17, 1991

"Proposal Development: A Total Quality Management Approach To Proposals"

Alexis Park Resort, Las Vegas, NV

Conference Chair: Jack Dean



5th Annual APMP Conference
May 24-26, 1994

"Entering the New Procurement Age"

Omni Shoreham Hotel, Washington, DC

Conference Chair: Fred Hines and the NCA Chapter

6th Annual APMP Conference
May 24-26, 1995

"Best Practices for Tomorrow's Competitive Edge"

Fairmont Hotel, Dallas, TX

Conference Chair: Daryl Jones and the Lone Star Chapter

9th Annual APMP Conference
April 28- May 1, 1998

"Broaden Your Horizons"

Broadmoor Hotel, Colorado Springs, CO

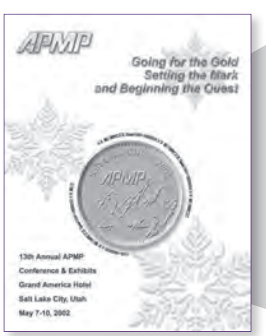
Conference Chair: David Bol and the Rocky Mountain Chapter

10th Annual APMP Conference
May 25-28, 1999

"Waves of Change...Competing in the New Millennium"

Town and Country Resort, San Diego, CA

Conference Chair: Karil Skrudrud Adams and the San Diego Steering Committee



13th Annual APMP Conference
May 24-27, 2002

"Going for the Gold...Setting the Mark...Beginning the Quest"

Grand America Hotel, Salt Lake City, UT

Conference Chair: Stephen Shipley with support from the APMP Board of Directors

14th Annual APMP Conference
May 24-27, 2003

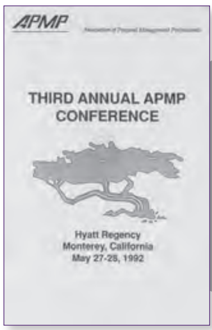
"Breakthrough Innovations in Winning"

Sheraton New Orleans, New Orleans, LA

Conference Chair: Eric Gregory with support from the APMP Board of Directors proposal management," and identify "future challenges and possibilities for increasing effectiveness and competitiveness through fostering professional growth and networking." The same holds true today on a much larger scale.

Last year's conference drew 547 association members to Phoenix, Arizona. APMP is one of the few organizations anywhere that can boast nearly 30 percent total membership attendance at its professional conferences. Combined with local chapter meetings, regional symposia such as the Southern Proposal Accents Conference (the 10th Annual SPAC is slated for October 20, 2006), and international conferences (the latest UK APMP Annual Conference was held October 13-14, 2005), APMP enjoys an active, vital, and involved membership, more than 2,000 worldwide and growing.

The following thumbnails trace the history of APMP Annual Conferences, from San Diego to New Orleans, and all stops in between.



3rd Annual APMP Conference
May 28-30, 1992

"Moving Forward Together in the 90s"

Hyatt Regency, Monterey, CA

Conference Chair: George McCulley

4th Annual APMP Conference
May 19-21, 1993

"An End to End Review of the Competitive Process"

Marriott Mountain Shadows, Scottsdale, AZ

Conference Chair: Steve Myers and the Valley of the Sun Chapter

7th Annual APMP Conference
May 22-25, 1996

"Competitions Throughout Industries"

St. Francis, Hotel, San Francisco, CA

Conference Chair: Ande Samson and the Bay Area Chapter

8th Annual APMP Conference
May 20-23, 1997

"An Invitation to Imagination"

Walt Disney World Swan Hotel, Orlando, FL

Conference Chair: Bob and the Central Florida Chapter

11th Annual APMP Conference
May 24-27, 2000

"Ascend to New Heights...liftoff into the 21st Century"

Walt Disney World Dolphin, Orlando, FL

Conference Chair: Eric Gregory with support from the Florida Steering Committee

12th Annual APMP Conference
May 24-27, 2001

"Transitions...2001 A Proposal Odyssey"

Albuquerque Convention Center, Albuquerque, NM

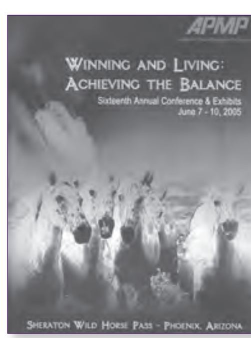
Conference Chair: Tom Amrhein with support from the Government Liaison Task Force and APMP Board of Directors

15th Annual APMP Conference
June 1-4 , 2004

"From Concept to Contract"

Diplomat Resort, Hollywood, FL

Conference Co-chairs: Karen Shaw and David Winton



16th Annual APMP Conference
June 7-10 , 2005

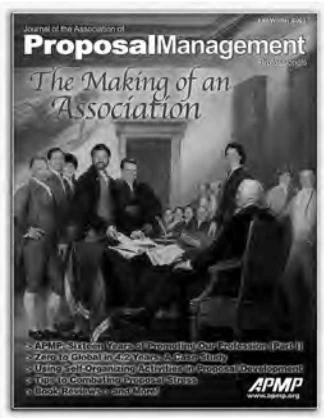
"Winning and Living...
Achieving the Balance"

Sheraton Wild Horse Pass, Phoenix, AZ

Conference Co-chairs: Kirste Ross and David Winton

Index of Articles

Note: Archive articles are posted in PDF format at the APMP Website, www.apmp.org.



FALL/WINTER 2005

Article	Dickinson, David	*Zero to Global in 4.2 Years. A Case Study in Small Proposal Center Management*
Review-Book	Paskun, Ali	*Comma Sutra: Position Yourself for Success with Good Grammar (by Laurie Rozakis, Ph.D.)*
Review-Book	Granger, Lori	*Renovate Before Your Innovate: Why Doing the NEW Thing Might NOT be the RIGHT Thing (by Sergio Zyman)*
Review-Book	Paskun, Ali	*RFP Nation: How to Increase Your Firm's Win Rate in Our Proposal-driven Business (by Martin Andelman)*
Award	APMP	*The APMP Fellows Award*
Article	Sokolow, Jayme A., Ph.D.	*Using Self-Organizing Activities in Proposal Development: What Harvester Ants, Urban Pedestrians, Enthusiastic Audiences, and the Ford Motor Company can teach us about getting the most out of our proposal teams*
Article	Jolly, Colleen	*Tips to Combating Proposal (and life and work and family and ...) Stress*
Article	Paskun, Ali & Elder, John	*APMP: Sixteen Years of Promoting Our Profession (Part 1)*
Sponsorship	APMP	*APMP Corporate Sponsorship*

SPRING/SUMMER 2005

Article	Herther, Jay	*The Difference Between Winning and Losing Capture Efforts*
Article	Keller, Chuck	*Extra, Extra! Read All About It! Using Newspaper Techniques for Proposal Development*
Review-Book	Paskun, Ali	*Carolyn 101: Business Lessons from* The Apprentice's *Straight Shooter (by Carolyn Kepcher with Stephen Fenichell)*
Review-Book	Paskun, Ali	*Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (by Robert S. Frey)*
Review-Book	Granger, Lori	*Awake at Work: 35 Practical Buddhist Principles for Discovering Clarity and Balance in the Midst of Work's Chaos (by Michael Carroll)*
Review-Book	Myerov, S. Jonathan	*Powerful Proposals: How to Give Your Business a Winning Edge (by Terry R. Bacon)*
Article	Frey, Robert S.	*Winning Federal Government Contracts Through Fact-Based Storytelling*
Sponsorship	APMP	*APMP Corporate Sponsorship*

FALL/WINTER 2004

Announcement	APMP	*APMP 2005 Annual Conference*
Announcement	APMP	*Welkom! Dutch Chapter of APMP*
Announcement	APMP	*Attention All Editors and Proofreaders!*
Article	Bettinger, Joan	*Creating a Proposal Services Department*
Trends & Views	Smith, Russell	*Proposal Departments: Whether to Use Permanent Staff or Consultants*
Commerce-Products	Jolly, Colleen	*Resources for Women Proposal Professionals*
Review-Book	Winton, David	*Brunellschi's Dome: How a Renaissance Genius Reinvented Architecture (by Ross King)*
Review-Book	Paskun, Ali	*Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation! (by Lynne Truss)*
Review-Book	Paskun, Ali	*Walking the Tightrope: Balancing Family Life and Professional Life (by Dr. Tom Barrett)*
To Wit	Sokolow, Jayme A., Ph.D.	*The Proposal Gene*
Sponsorship	APMP	*APMP Corporate Sponsorship*

SPRING/SUMMER 2004

Article	Jolly, Colleen	*Designing a Winning Proposal*
Article	Sokolow, Jayme A., Ph.D.	*How Do Reviewers Really Evaluate Your Proposal? What the Cognitive Science of Heuristics Tells Us About Making Decisions*
Article	Stewart, John Parker & Stewart, Daniel	*Orals Coaching: The Secret Weapon for Winning Contracts*
Award	APMP	*The APMP Fellows Award*
Call for Papers	APMP	*APMP 2005 Annual Conference Call for Presentations*
Review-Book	Paskun, Ali	*The Capture Management Life-Cycle (by Gregory A. Garrett and Reginald J. Kipke)*
Review-Book	Paskun, Ali	*Changing Minds: The Art and Science of Changing Our Own and Other People's Minds (by Howard Gardner)*
Sponsorship	APMP	*APMP Corporate Sponsorship*

FALL/WINTER 2003

Article	Parker, Richard A., Duffy Eletha L., Esq., Williams, Jon	*Security: The Essential Partner in Proposal Management*
Book Excerpt	Sant, Tom	*Why the Inuit Hunt Whale and Other Secrets of Customer Behavior*
Case Study	Shoulders, Reba L.	*Winning Business with International Lotteries: SGI Discovers It's Not All Fun and Games*
How To	Sokolow, Jayme A., Ph.D.	*Developing a Performance-based Work Statement: Morph Yourself Into a Performance-based Expert NOW Before It's Too Late*
Profile	Green, R. Dennis	*Professor of Persuasion– Dr. Tom Sant*
Review-Book	Hannigan, Joanna	*Thinking for a Change: 11 Highly Successful People Approach Life and Work (by John C. Maxwell)*
Review-Book	Sheffler, Cathy	*The Human Organization of Time: Temporal Realities and Experiences (by Allen C. Maxwell)*
Review-Book	Williamson, Monica	*Winning Behavior: What the Smartest, Most Successful Companies Do Differently (by Terry R. Bacon and David G. Pugh)*
To Wit	Green, R. Dennis	*Buzzword Bingo*

SPRING/SUMMER 2003

Article	Landgren, Theodora	*Successful Proposal Translation Strategies: Proven Guidance for Approaching Multi-Language Bid*
Article	Munger, Roger, Ph.D.	*Information Design: Strategies to Make Your Proposal Reader Friendly*
Article	Williams, Jon	*Publish and Be Damned? The Powers and Perils of Pre-written Content*
Focus on Basics	Garrett, Gregory A. & Kipke, Reginald J.	*A Capture Management Life Cycle Primer: Learning to Dance with Customers*
Profile	Green, R. Dennis & Meehan, John	*David A. Franke – Champion for Air Force Acquisition Excellence*
Profile	Green, R. Dennis & Meehan, John	*Alan Goldberg, An Inquiry into Effective Acquisition – and Standing the Test of Time*
Review-Book	Hannigan, Joanna	*Leap. A Revolution in Creative Business Strategy (by Bob Schmetterer)*
Review-Book	Hannigan, Joanna	*Execution, the Discipline of Getting Things Done (by Larry Bossidy and Ram Charan)*
Review-Book	Smith, Maggie	*Good Work, When Excellence and Ethics Meet (by Howard Gardner, Mihaly Csikzentmihalyi & William Damon)*
Survey Report	Elder, John & Austin, Rick	*Productivity, Sales Gains Reported by Users of Proposal Automation Software*
To Wit	Sokolow, Jayme A., Ph.D.	*The Proposal Professional as Primate: Lessons from the Jungle*
Trends & Views	Frey, Robert S.	*Beyond Compliance: Towards Solution and Storyline Development as Valuable Proposal Management Core Competencies*
Web	Elder, John & Paskun, Ali	*Proposal Resources on the Web*

FALL/WINTER 2002

Capture Mgmt	Bacon, Terry R.	*Creating Preference*
Methodology	Nutt, Howard	*Business Development Capability Maturity Model and Proposal Professionals*
Packaging	Frey, Robert S.	*Packaging and Managing Proposal Information and Knowledge Effectively*
Profile	Green, R. Dennis	*Looking Back with Edward J. Velton*
Profile	Green, R. Dennis	*Always In Motion – Patty Nunn*
Questions	Herndon, David & Ransone, R.	*Why, When, and How to Ask Questions on Government Solicitations*
Review-Book	Gaither, Joanna Hannigan	*Accidental Magic: Wizard's Techniques for Writing Words (by Roy H. Williams)*
Review-Book	Spangler, Barry	*Proposal Development – How to Respond and Win the Bid (By Bud Porter-Roth)*
To Wit	Fields, Barry	*When Par Isn't Good Enough*
Training	Lownie, B.J.	*Improving the Proposal Team (Improvisational Theatre Techniques)*
Training	Wilson, Greg	*Proposal Training for Organizations*
Trends & Views	Devore, Chuck & Moler, T.	*US DoD B&P on the Rise: What Does It Mean?*
Writing	Sokolow, Jayme	*Taking the Arrogance Out of Proposal Writing*

SPRING/SUMMER 2002

Capture Mgmt	Pugh, David G.	*A Bidder's Dozen: Golden Rules for Winning Work*
Leadership	Amrhein, Tom	*Failure to Lead, Leads to Failure: The Art of Proposal Management*
Philosophy	Sokolow, Jayme	*Fredrich Nietzsche? For Proposal Professionals?*
Production	Kelman, Suzanne	*Proposal Production: A Primer on Quality Drivers, Lead Times, and Production Task Scope*
Products-Commerce	Wilson, Greg	*Developing 'In-house' Proposal Tools*
Profile	Green, R. Dennis	*The Proposal Industry Council*
Review-Book	Parks, Jennifer	*Sales Proposals Kit for Dummies (by Bob Kantin)*
Review-Book	Peterman, Todd	*Shipley Associates Proposal Guide for Business Development Professionals (by Larry Newman)*
Review-Book	White, Mark	*Win Government Contracts for Your Small Business (by DiGiacomo and Kleckner)*
Security	Cavanaugh, Tom	*Computer Security from a Proposal Perspective*
Security	Rhea-McKenzie, Denise	*Proposal Security 101: Basics of Managing Competition Sensitive Data*
Service-Learning	Munger, Roger	*Workplace-Classroom Collaborations [Internships]: A Role for Service Learning in Proposal Development*
To Wit	Gregory, Eric	*Reeling in the Big Ones (Lessons from Fishing)*

SPRING 2001

Electronic Procurement	Irby, Gay T.	*The Electronic Procurement Revolution [NASA]*
History	Sokolow, Jayme	*Nineteenth Century Contracting Foibles in the Building of America's Canals*
How-To	Eassom, Dick	*MS Word Power*
How-To	Herndon, David H.	*RFP Response Mapping and Compliance Identification*
Products-Commerce	Wilson, Greg	*RFP Master Product Demonstration Review*
Profile	Green, R. Dennis	*Michael J. Ianelli – A Business Development Virtuoso*
Recruitment	Siskind, Jon	*Bidding for the Best and Brightest: Recruiting and Hiring Top Quality Proposal Professionals*
Review-Book	Bennington, Amy	*Government Proposals: Cutting through the Chaos (by Rebecca Shannon)*
Review-Book	Bielak, Susan	*Successful Proposal Strategies for Small Businesses, 2nd Ed. (by Robert Frey)*
Telecommuting	Greer, Sherri R.	*Telecommuting and the Proposal Manager*
Trends & Views	Dean, Roger	*Demise of Dinosaurs*
Web	Ognibene, Peter J.	*Net-working the Web*

FALL 2001

Best Value	Dempsey, David B.	*Best Value Proposals Under OMB Circular A-76*
Best Value	Mickaliger, Michael J.	*Best Value Contracting: Selection by Perception*
Cost Control	Turnbull, Duane	*Tips to Cutting Proposal Costs*
Cost Proposals	Dean, Roger	*Dollars and (Non)Sense [Trends & Views]*
Cost Proposals	Newman, Larry	*Developing Cost Price Data [Proposal Guide Excerpt]*
Cost Proposals	Oyer, Darrell J.	*Developing Cost Estimates for Proposals to the Government [Book Excerpt]*
Cost Proposals	Snodgrass, Alan	*CAIV: Cost As an Independent Variable*
Nonprofits	Sokolow, Jayme	*Nonprofit Lessons for the Business World*
Products-Commerce	Wilson, Greg	*Proposal Automation Products – Product Survey*
Profile	Green, R. Dennis	*Perpetual Youth: Story of Lou Robinson and Gene Dawson*
Review-Book	Casey, Ann Marie	*The Strategy and Tactics of Pricing: A Guide to Profitable Decision Making (by Nagle & Holden)*
Review-Book	Napolitano, Jennifer C.	*Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits (by Barbato & Furlich)*
Review-Book	Parks, Jennifer	*The Great Wave: Price Revolutions and the Rhythm of History (by David Hackett Fischer)*
To Wit	Mar, Jen	*Proposal Phobias: Revelations and Cure*

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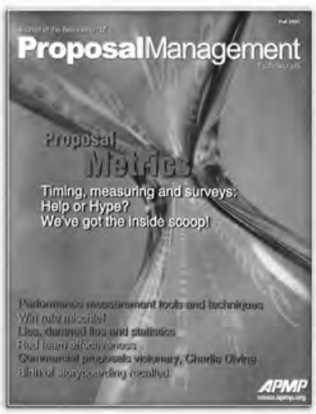
Case Study	Miller, Robert L.	*An Architectural Proposal in the Modern Vein [An A/E/P Procurement]*
Case Study	Rhea-McKenzie, Denise	*A Virtual Private Network Case Study [Litton PRC Defense Systems]*
Electronic Procurement	Jacobs, Barry E.	*How Electronic Handbooks are Changing the Way Federal Agencies Manage Grants and Contracts [DOJ & NASA]*
Electronic Procurement	Nunn, Patricia A.	*Federal Electronic Procurement, Past and Future: Feeding 'Need for Speed'*
History	Sokolow, Jayme	*Pioneers in Virtual Reality: From Ancient Pompeii to Modern Baseball*
International	McFarlane, Eileen Luhta	*Developing International Proposals in a Virtual Environment: A Cultural and Personal Perspective*
Products-Commerce	Dickson, Carl	*Web Technology – Trends to Watch*
Profile	Green, R. Dennis	*Spotlight on Marianne Gouveia*
Profile	Rider, Rick & Green, R. Dennis	*Steve Shipley: CEO, Shipley Associates, Inc.*
Review-Book	Maddry, Lisa M.	*How to Write a Statement of Work -4th Ed. (by Peter S. Cole)*
Review-Book	Parks, Jennifer	*The Elements of Technical Writing (by Gary Blake and Robert Bly)*
Small Business	Davis, John	*So What is SBIR/STTR?*
Trends & Views	Dean, Roger	*Virtual Teaming – The Proposal Siren Song*
Writing	Green, R. Dennis	*Web Writing – Using the Write Brain*



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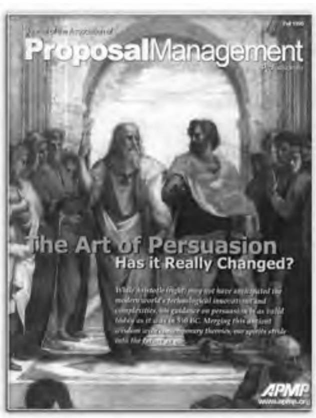
Case Study	Mesing, Paul	*Metrics at NCR's Proposal Center*
Case Study	Salamida, Marietta	*Process Improvement Methodology [Lockheed Martin Federal Systems]*
History	Starkey, Walter S.	*The Beginnings of STOP Storyboarding and the Modular Proposal*
Metrics	Dean, Roger	*Win Rate Mischief [Trends & Views]*
Metrics	Freeman, Rich & Freeman, James S.	*A Metrics Toolbox: Scoring System to Help Evaluate Proposals and Processes*
Metrics	Freeman, Rich & Freeman, James S.	*Proposal Writing Metrics*
Metrics	Martens, Mark	*Performance Measurement and Outsourcing [Informed Comment]*
Metrics	Sokolow, Jayme	*Lies, Damned Lies, and Statistics: The Use and Abuse of Numbers*
Products-Commerce	Wilson, Greg	*A Competitive Intelligence Product Review: Knowledge Works (from Cipher)*
Profile	Green, R. Dennis	*Divine Intervention [Charlie Divine]: Leadership in New Commercial Proposal Paradigm*
Red Teams	Herndon, David H.	*Using Red Teams Effectively – Focus on Basics*
Review-Book	Beeler, Steve	*Technical Writing: A Practical Approach (by William S. Pfeiffer)*
Review-Book	Bragaw, Robert	*American Management Association – Self Development for Success Series*
Review-Book	Giguere, Paul	*Proposal Writing: The Art of Friendly Persuasion (by W. S. Pfeiffer and C.H. Keller, Jr.)*



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Graphics	Horton, William & Horton, Katherine	*Picture-Perfect Proposals: Putting Visual Literacy to Work*
Leadership	Green, R. Dennis	*Leadership as a Function of Power – Gary Yukl Research*
Orals/Pres.	Leech, Thomas	*The "Murphy Foiler" Checklist*
Orals/Pres.	Leeds, Dorothy	*Conquer Speaking Faults and Succeed as a Team*
Orals/Pres.	Pease, Gregory W.	*Persuasive Oral Proposal Presentations*
Persuasion	Dean, Roger	*The More Things Change, the More They Stay the Same [Trends & Views]*
Persuasion	Durack, Katherine T.	*It All Comes Out In The Wash: Persuasion in Technical Proposals – 19th C. Washing Machine Applications [Patent]*
Persuasion	Sokolow, Jayme	*The Darker Side of Persuasion: Stanley Milgram's Experiments on Obedience to Authority*
Products-Commerce	Green, R. Dennis	*Proposal Products: Another Great Proposal Automation Tool*
Products-Commerce	Nix-Karnakis, Nancy L.	*Proposal Room Wall Hanging Systems – Tailor to Suit*
Profile	Green, R. Dennis	*Profile – Steve Myers: Chairman and CEO, SM&A Corporation*
Review-Book	Giguere, Paul	*Franklin Covey Style Guide for Business and Technical Communication, 2nd Ed.*
Review-Book	Sokolow, Jayme	*Visual Explanations: Images and Quantities, Evidence and Narrative (by Edward R. Tufte)*
Review-Book	Sokolow, Jayme	*Envisioning Information (by Edward R. Tufte)*

FALL 1999

Competitive Intelligence	Prescott, John E.	*The Evolution of Competitive Intelligence: Designing a Process for Action*
History	Boren, Tom	*How Industry and Later APMP Made Contributions to Proposal Process*
History	Boren, Tom	*Win Rate Mischief [Trends & Views]*
History	Boren, Tom	*The Impact of Evolving Government Procurement Practices*
History	Boren, Tom	*The Impact of Technology (on Proposal Development)*
History	Sokolow, Jayme	*Renaissance Proposal Managers – da Vinci and Machiavelli*
History	Sokolow, Jayme & Green, R. Dennis	*Wright Brothers' 1908 Proposal for a Heavier-Than-Air Flying Machine*
Products-Commerce	Green, R. Dennis	*Proposal Products: Review of Proposal Automation Tools*
Review-Book	Brome, Nancy J.	*Handbook for Writing Proposals (by Robert J. Hamper and L. Sue Baugh)*
Review-Book	Mitchell, Linda	*Show Me: The Complete Guide to Storyboarding and Problem Solving (by Harry I. Forsha)*
Review-Book	Perri, Rich	*The Anatomy of Persuasion (by Norbert Aubuchon)*
Review-Book	Prichard, Beth M.	*High-Impact Presentations: A Multimedia Approach (by Jo Robbins)*
Trends & Views	Dean, Roger	*From Cave Walls to the Internet: Lots of progress, but are we any better off?*

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