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Cover Art by Marc Bolea, 24 Hour Company.
Graphics and Layout by Lakin Jones and 24 Hour Company.

CEO Forum

by Dick Eassom, AF.APMP

2007 was a year of consolidation for our Association, and we entered 2008 with more than 2,500 members worldwide and a network of successful local chapters. This year, we will continue to invest prudently in benefits for our members.

It has been nearly four years since we published our last Salary Survey, a document that has proven to be very popular with both members and employers. Charlie Divine, PPF.APMP, an APMP Fellow and our Education and Accreditation Director for 2008/9, will soon be initiating a new salary survey, and I encourage all of you to participate by submitting your employment data. This is an important survey and aims to increase the professional standing and remuneration of those in our profession.

We welcome your suggestions for ways that we can increase our membership.

You will also see some changes to our Website, www.apmp.org. If you Google for "Proposal Management" or "Proposal Professional" you will see APMP at the top of the search results! Our Marketing Communications Director, Suzanne Kelman, AM.APMP, recently re-elected for 2008/9, will be rolling out forums on our Website very soon. These forums will allow you to share questions and advice with other members. We will also be moving much of the archival content of our Website, e.g. back issues of the *Perspective* and the *Journal*, into a "Members Only" area. We believe this content should only be a benefit to our members and not freely available to the Internet-browsing public. Please continue to check our Website regularly for updates on the Annual Conference, local chapter meetings, and other news and events.

I hope many of you will be able to attend our 19th Annual Conference at the Westin Mission Hills in Rancho Mirage, CA, just outside Palm Springs. This is a beautiful resort, and the schedule of presenters promises a valuable conference for both capture and proposal professionals. We are holding a pre-conference golf event for those of you that would like to enjoy the PGA-quality greens at the Westin, and there are preconference workshops offering accreditation examination preparation, BD-CMM, and business development metrics. Please check our Website regularly for more details and updates about these pre-conference events and the conference in general.

We will be representing APMP at the annual conferences of other professional organizations, such as the International Association for Contract and Commercial Management (IACCM) in Scottsdale, AZ; the Society of Competitive Intelligence Professionals (SCIP) in San Diego, CA; and the Society for Technical Communication (STC) in Philadelphia, PA. Many of you may be members of these organizations, and our attendance at their conferences will introduce many more to APMP and the benefits of our Association.

Finally, we will be investigating tools that will introduce these benefits to a wider audience, while increasing the benefits to our existing members. One proposal that your Board of Directors is considering is the use of podcasts that provide useful information on various aspects of capture and proposal development. We welcome your suggestions for ways that we can increase our membership; reach out to those people who have to create proposals yet have never heard of APMP; and start more local chapters to allow a meeting space for people to share their knowledge and experience in our profession.

On behalf of your APMP Board of Directors, we look forward to meeting as many of you as possible at our Annual Conference!

GPS
Global Positioning Strategies
for Capture and Proposal Professionals

19th Annual
APMP International
Conference & Exhibits

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APMP®

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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General Information

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

Membership

The people of APMP are some of the most resourceful professionals in the business world today. We invite you to join us and discover how we can help you pursue new horizons in proposal excellence. To access a New Member Registration Form, renew your membership, or find information on becoming a Corporate member of APMP, please visit the Website (www.apmp.org), and click on "Membership."

Membership in APMP is $125.00 (USD) per year, renewable on the anniversary date of joining the Association. If you do not wish to provide credit card or electronic check information online, please complete the membership application and indicate you are paying by check. Then contact MemberServices@apmp.org or call Barry Fields at (406) 788-9840 to make arrangements for payment.

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

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

Advertising Rates and Guidelines

The following rates are effective for 2008:

Rates per Issue:
Premium Placement Locations*
(Sold for both 2008 issues)

- Back Cover: $3,000.00 (4 Color)
- Inside Front Cover: $2,500.00 (4 Color)
- Inside Back Cover: $2,500.00 (4 Color)

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- Full Page: $2,000.00 (B&W)
- Half Page: $1,200.00 (B&W)

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

Rates for 2009 will be published in the Fall/Winter 2008 issue.

Schedule:

- Ad commitment (50% deposit required)—due February 1st (for Spring) or August 1st (for Fall)
- Electronic copy—due March 1st (for Spring) or September 1st (for Fall)
- Final payment due to APMP—March 1st (for Spring) or September 1st (for Fall).

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For technical assistance, please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

Please visit the APMP Website at www.apmp.org for additional information, including viewable PDF files of advertisements and articles.

Invitation to Writers

Contribute to our next issue. Let us hear from you today. We are open to many and varied topics of interest to professionals in our field.

Send us a letter, submit an article, or propose your topic of interest. Submit a short (50-word) proposal for your article summarizing its principal thesis, issues, basis, and scope. You do not need to be an APMP member to contribute.

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

For more information or to plan your contribution, call or email us:

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Guidelines for Authors

The Journal of the Association of Proposal Management Professionals (The Journal) publishes articles, research efforts, and case studies about business development and proposal management. It provides examples of practical application of industry-accepted best practices to enhance our readers' professional development. You are invited to submit articles for publication in The Journal. We are open to many and varied topics of interest to professionals in our field.

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

If you would like to submit an article, begin by reading these Guidelines for Authors. They provide general guidance on manuscript preparation, scope of content, style, and methodology for submission and review. The following table provides *The Journal's* publication schedule to aid authors in determining submission milestones.

	Spring/ Summer	*Fall/ Winter*
Concept approval	August	February
Summary and outline due	October	April
Article first draft	December	June
Peer review	January	July
Article final due	February	August
Print	March	September
Distribute	April	October

Editorial Statement

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

Content

The Journal publishes the following types of peer-reviewed articles:

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

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

Submissions

The following are requirements for articles/ manuscripts submitted:

- Not more than 30 pages, including exhibits, printed on 8 1/2" by 11" paper
- 12-point font and at least one-inch margins on all four sides
- Double-spaced throughout, including references
- Submit an electronic file of your article via email; Microsoft Word is the preferred electronic format
- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format; screenshots are preferred to be captured and output should be 6" (width) by 4.5" (height) for full screens
- Submit your article to the Managing Editor or the Chair of the Editorial Advisory Board:

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Manuscript Preparation

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

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

Style

Articles must be well organized and readable. Write clearly and avoid jargon and acronyms. Use the active voice. Avoid language that might be construed as sexist, and write with *The Journal's* international audience in mind. The authority for spelling/usage is Webster's Dictionary, and The Chicago Manual of Style is the authority for punctuation and format. All articles are reviewed and edited by members of *The Journal* staff.

Review

Submissions, if they conform to the above specifications, will be reviewed by the Editorial Advisory Board 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(s) with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Conflict of Interest

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

Objectivity

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

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Welcome

by John Elder, AF.APMP

Bonjour, et bienvenue à la première édition du Journal pour 2008!

Hello, and welcome to the first issue of the Journal for 2008!

As you can see, this issue has taken on an international flare. We are proud to offer a fascinating article by one of our French colleagues, Giandra de Castro, detailing how she helped introduce proposal management in France. No doubt you will find her journey interesting and inspiring. Other international APMP members will have featured articles in upcoming issues, so please watch for that.

There are several articles in this issue that will motivate you both professionally and personally. Ann L. Moss and Mike Parkinson have teamed to provide an effective way to make editing graphics easier. Their article will show you how the Visual Proofreading process can streamline your process and improve the quality of your proposal graphics. Jay Herther correlates his experiences working in the restaurant industry with ways we can recognize and reward our proposal teams and staff. Let's face it—we all have felt underappreciated at some point in our careers. Jay offers some basic and innovative things we can do to show, and feel, more appreciated for what we do. Jayme Sokolow examines recent research into what makes people happy. He also offers suggestions on how those findings can raise a proposal professional's level of happiness.

This May 27-30, the 19th Annual APMP International Conference and Exhibits will offer presentations, workshops, and panel discussions so that you may formulate your own Global Positioning Strategies for capture and proposal excellence.

This May 27-30, the 19th Annual APMP International Conference and Exhibits in Rancho Mirage, CA will offer presentations, workshops, and panel discussions so that you may formulate your own Global Positioning Strategies for capture and proposal excellence. Check out your conference brochure or the Website at http://www.apmp.org/ca-29.aspx for more information on registration, the planned program, pre-conference workshops, and other events.

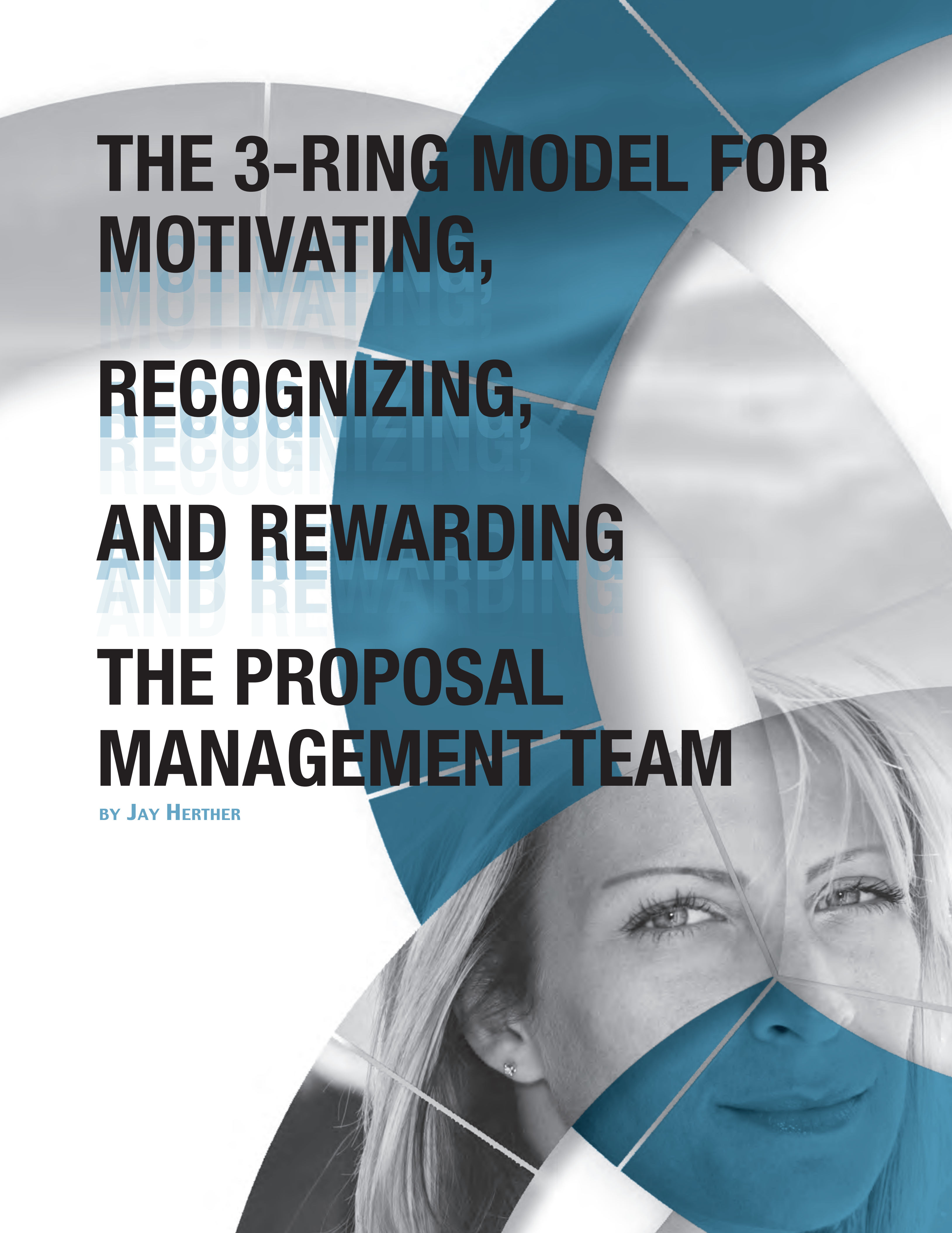
I would like to take this opportunity to welcome Betsy Blakney, AM.APMP to the Journal staff. Betsy is a past contributor, and she has recently assumed the role of Books Editor. She and her group of volunteers offer several book reviews in this issue covering such diverse issues as managing an externally funded project, winning more business through using best practices, creating graphics with more impact, defining how managers can build better relationships, and getting results through business writing that succeeds.

Au revoir, et moi vous verra à la Conference!

Goodbye, and I'll see you at the Conference!

THE 3-RING MODEL FOR MOTIVATING, RECOGNIZING, AND REWARDING THE PROPOSAL MANAGEMENT TEAM

BY JAY HERTHER



Getting to Win

The 3-Ring Model provides the techniques to lead the proposal team into the Winner's Circle and can help motivate, recognize, and reward the proposal team.

If you read the scores of proposal books published over the past 30 years, the primary focus is on "the process" (i.e., win strategy, writing techniques, red teams). However, a respected proposal veteran of 35-years made a very profound statement to me: "Jay, all the process in the world is no good if no one follows it correctly. To win you need motivated proposal animals." I agree that to win you need "passionate people." This article is about how to ignite and sustain that passion.

As a teenager, I worked as a busboy in a restaurant. Now, more than 30 years later, the same management lessons I learned in the restaurant industry are closely correlated to the key practices have I witnessed in my 20 years of winning in the proposal management field.

The 3–Ring Model

The challenge at my restaurant was similar to the challenge in our proposal field—how does management motivate the team? As a busboy, I was motivated by the tips I received from the wait staff and how I was treated. The faster I could clear and set up tables, the more money the restaurant and wait staff would generate. Similarly, as part of the lifeblood of our business, proposal professionals need to be highly motivated and directly recognized and rewarded for their performance.

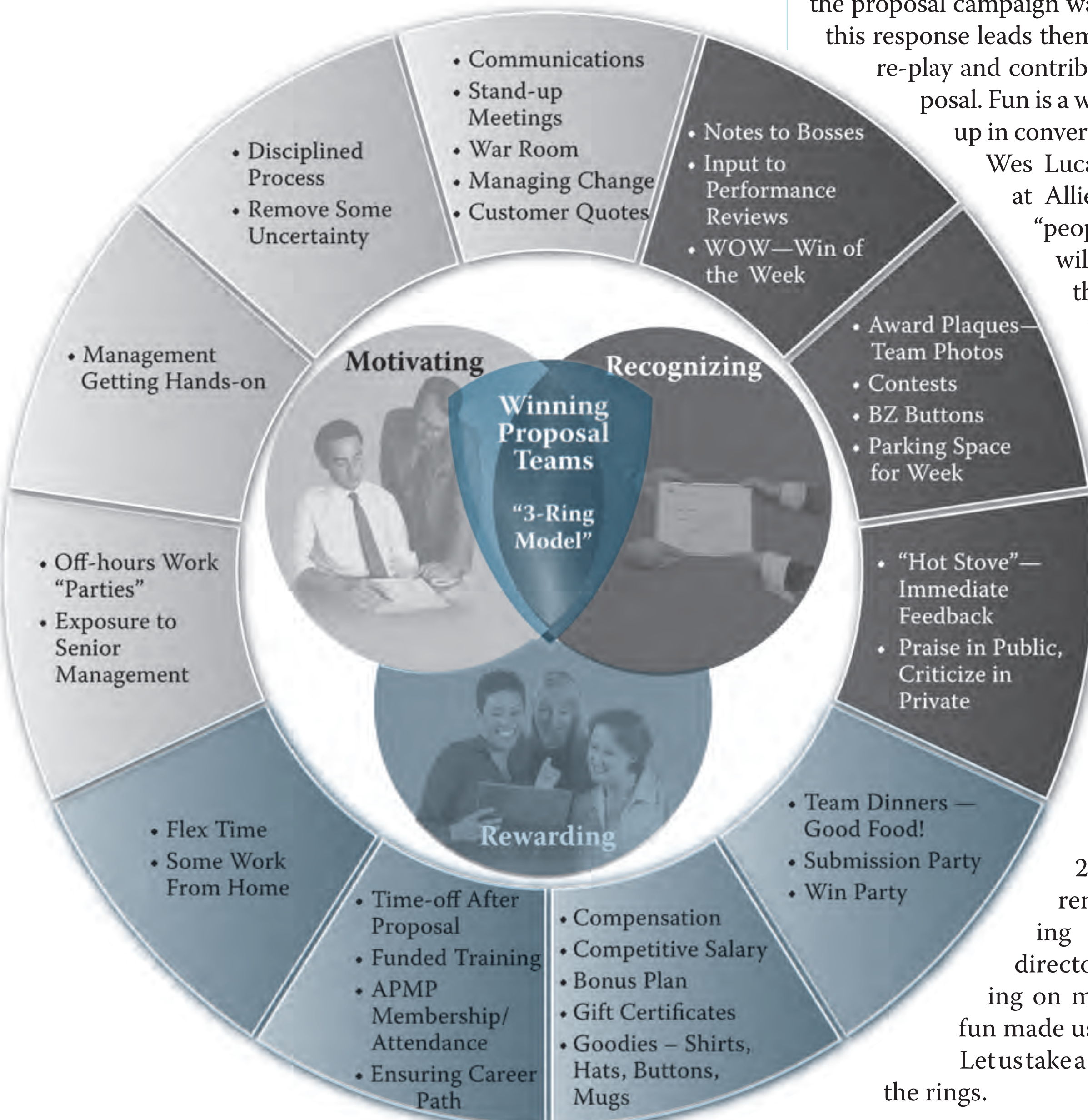


Figure 1.

As shown in Figure 1, the 3-Ring Model focuses on successful techniques for motivating, recognizing, and rewarding the proposal team. Without these techniques, a proposal effort can turn out to be more like a 3-ring circus.

The mission is to create and maintain an environment that helps mitigate long hours, stress, and challenging deadlines. The goal is to create a productive and cooperative team environment to increase the Probability of Win (Pwin). Surprisingly, after executing the 3-Ring techniques, many people actually say the proposal campaign was fun! Like pinball, this response leads them to sign-up to get a re-play and contribute to the next proposal. Fun is a word that often crops up in conversations with leaders. Wes Lucas, a vice president at Allied Signal, says that "people working for him will do a better job if they are having fun, too." [Tichy, 2007]

On one proposal, the director would drop by on a weekend with a box of doughnuts and ask "Are we having fun yet?" He would then proceed to write a page or two or generate a graphic concept. Although we usually had to re-write his pages, 20 years later I still remember the uplifting morale boost this director gave me by helping on my section and how fun made us more productive.

Let us take a closer look at each of the rings.

The First Ring—Motivating

"To sustain the momentum requires 'care and feeding' of your proposal team. Things like coaching, inspiring, mentoring and evaluating are important." [Amrhein, 2002]

Motivation starts with effective communication with the team. The key is to make sure the team understands the broader vision, such as "Winning this proposal will help provide more jobs, job stability, and growth opportunities for our people." Another motivator is an emotional, purpose-driven goal, such as proposing to "Provide equipment to our Warfighters that are in harm's way." It is useful to personalize the experience with mind-maps, such as "Winning this program will help pay for gas in our cars and help us all save for our children's college education." This gives the team members a feeling of "small company" ownership, and highlights the importance of new business as the lifeblood of any enterprise. Following these initial communications with regularly scheduled meetings to status the plan and review action items gives the team a sense of direction and accomplishment.

A disciplined process motivates the team, reduces anxiety, and creates "reduced uncertainty." Professor Ralph Katz, who has taught at the MIT Sloan School of Management, described job satisfaction as a function of "reduced uncertainty." As uncertainty is reduced, satisfaction increases. As satisfaction goes up, productivity increases. Happier workers are more productive. To reduce uncertainty, leaders must provide clear direction and a solid plan. Specifically, the proposal leader must develop, publish, and frequently status a one-page schedule of all major events, as shown in Figure 2.

This scheduling process requires discipline and focus. The team may want to dwell on the whole downstream process, which can create uncertainty and angst. The best solution is to have everyone understand the entire proposal lifecycle process, but then reduce the aperture to focus on the next milestone (e.g., *Graphics due Wednesday COB, and Pink Team "Pens Down" is 11:59 P.M. on Thursday*). I have found myself emulating "horse blinders," putting my hands on each side of my face to symbolize keeping your eyes fixed on the immediate target and focused on achieving the next near-term objective.

> *Reduce the aperture to focus on the next milestone (e.g., Graphics due Wednesday COB, and Pink Team "Pens Down" is 11:59 P.M. on Thursday).*

Another motivating factor is stating a hard deadline with a culminating conclusion, such as "the proposal must be submitted by April 9, 2007 at 4:00 P.M." A strong motivational technique is to post a proposal countdown on a white board or poster as you enter the war room. Similar to a NASA

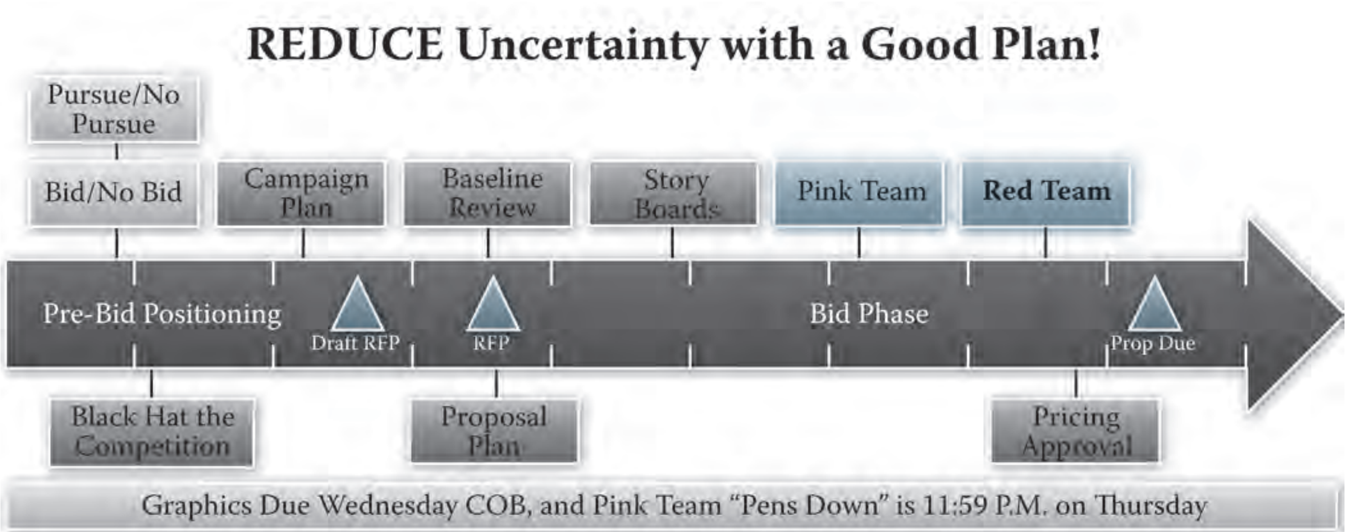


Figure 2.

rocket launch countdown, the "days to go" countdown leading up to a major milestone (such as a Red Team or final submission) indicates daily progress towards the milestone and proof that it will be accomplished on time.

High proposal standards and expectations include: "I expect eye-watering graphics and a section that makes me say Wow after I read it."

There are many non-financial motivators including "advancement, praise, exposure to senior people, the feeling of being challenged, the feeling of working on useful assignments, and respecting the work/life balance." [Woodruffe, 2006] Non-financial ways to motivate members of the proposal team can include:

- Letting the people who performed the work brief it to management. This gives them good exposure and enhances their career development.
- Providing exposure to other functional areas. Since Capture Teams are multi-functional and diverse, helping members increase their knowledge of Business Development, Sales, or Marketing techniques can increase their ability to become Capture Team leaders on the next campaign.
- Providing the opportunity to work the program and be involved at the outset of the project.
- Supporting APMP membership and funding related training (such as attending the APMP Annual Conference or participating in APMP Accreditation).
- Encouraging attendance at a national sales meeting or participation in new business reviews.

"Whenever a new Bertucci's Restaurant opens, CEO Joe Crungale and his top managers energize the restaurant's dishwashers, waiters, and bartenders by working side by side with them for the first two weeks of operation. We know they need help, so we just fill in wherever we can." [Nelson, 1997]

As a busboy, I worked for two different assistant managers. Their contrasting management styles became clear when the restaurant became busy (much like the post-RFP release timeframe). The first manager would yell and pressure the busboys to work harder and faster. The second manager would chip in and help clear a few tables to reduce the pressure. The entire restaurant staff found this manager's direct support very motivating.

When I started managing proposals, I wanted to be like that second manager. As a Capture Team/Proposal Lead, I take hands-on vertical plunges. In addition to personally writing the Executive Summary first (and always), I would review storyboards on Saturdays, drop by authors' offices to brainstorm a killer graphic, and write the first draft of section summaries.

A member of a recent proposal team summarized how such hands-on management helps generate infectious team spirit in this way: "What surprised me most in terms of leadership was the side-by-side, in-the-trenches dedication of the leadership team. To have Directors/Managers actively participate in all phases of the proposal, from daylong, storyboard reviews to final Green Team review, made a HUGE difference. Too often, proposals don't get the management attention they need early enough in the process to make a difference. This leadership team made decisions and committed resources **as they were needed**, not just when there was a crisis."

Frederick Herzberg, who has published ground breaking papers on how to motivate employees, says: "The only way to motivate employees is to give them challenging work in which they can assume responsibility. If you want someone to do a good job, give them a good job to do." [Herzberg, 1968] A proposal is a perfect opportunity to provide challenging work. The first step is to provide clear ownership. Although everyone helps each other on a proposal, there must be a single "belly button" solely responsible for each section and cost element. The second step is to "set the bar high" and provide energizing work. According to the late management guru, Peter Drucker, "Management needs to set and enforce high standards – not average standards." [Drucker, 1954]

High proposal standards and expectations include: "I expect eye-watering graphics and a section that makes me say Wow after I read it." This challenges everyone from the rookie proposal writer and first-time book boss to the engineer with a PhD.

Peter Drucker also notes that "Employees need to be motivated by feeling that they are part of the company, not just people whom a manager can give orders." He further adds, "Are you given the things you need—education and training and encouragement and support—so that you make a contribution?" [Drucker, 2006]. The goal of motivation must be more than just "employee satisfaction;" it needs to provide employees with the opportunity to take responsibility. Drucker believed that providing opportunities for people to take on responsibility and educating them to achieve success were some of the better ways to motivate employees.

The other key motivation component is to maintain high energy and enthusiasm. A positive, can-do attitude is critical. Be a cheerleader. Stay upbeat and positive. Keep painting a vision of the thrilling feeling of getting the call at 5 P.M. someday when you win. Enthusiasm is contagious. As Colin Powell states, "Perpetual Optimism is a Force Multiplier." This is particularly true on a proposal. Ben Zander, conductor of the Boston Philharmonic Symphony, was honored for his extraordinary work. His comment on his approach was, "I am a dispenser of enthusiasm." If the proposal leadership team is genuinely upbeat, the energy infects the whole team. "The winner's edge is in the attitude, not aptitude." [Maxwell, 2003] "Winning leaders create energy in others and motivate with their enthusiasm." [Tichy, 2007] "Jack Welch also had a point of view about how to energize people. It was pretty simple: Winning energizes people." [Tichy, 2007]

The Second Ring—Recognizing

"I always plan a recognition program for authors, which rewards the best, the most or the first. It can range from something as simple as your name on the wall, to a gift certificate, to getting a weekend off."

– Amrhein, 2002

"Employees should know how they are doing without being told (but they should have conspicuous praise when they accomplish something big). And, don't wait till someone retires or leaves to recognize contributions."

– Peter Drucker

"There are two things people want more than sex and money; recognition and praise."

– Mary Kay Ash, Founder, Mary Kay

I learned recognition techniques while working at that restaurant. Waitresses would share some of their tips, give busboys a piece of cheesecake too small to serve to customers, and make a little extra milkshake to share. Cooks would provide a little "pay for performance" by sharing a few fried shrimp with busboys that went "above and beyond." The most capable and dependable busboys were rewarded with some flex time to pick the shifts they wanted to work. Plaques honored the "Employee of the Month." A standard rule applies here: praise in public and criticize/discipline in private. Another good rule of thumb is: "For every four informal rewards (e.g., thank-yous), there should be a more formal acknowledgement (e.g., a day off from work), and for every four of those, there should be a still more formal award (e.g., a plaque or formal praise at a company meeting), leading ultimately to such rewards as raises, promotions, and special assignments." [Nelson, 1994]

We must do everything we can to help our proposal teams balance their lives and their workloads. Here is a "Top 7" list of ideas to recognize the proposal workload and to make it fun:

1. Give them peanuts! (MBWA – Management By Wandering Around and handing out peanuts or snacks as a way to spend some informal time together.) "Winning leaders rarely miss an opportunity to energize their people. MBWA, when done correctly, is an obvious, simple mechanism for staying in touch, listening and energizing people." [Tichy, 2007]
2. Generate team morale with trinkets with logos, such as hats, T-shirts, coffee cups, miniaturized product models, etc. Like

we had at the restaurant, providing employees with branded shirts, hats, coffee mugs, or other items with a company or program logo is a fun way to build team spirit and camaraderie. "Simple observation suggests that most of us are trinket freaks – if they represent genuine thanks for a genuine assist." - Tom Peters. [Kaye, 1999]

3. Allow casual or theme dress. Take team photos. Tell fun stories about proposal bloopers.
4. Keep the team well fed. Team dinners are an important break and team-building event. Pizza night after night is boring and can be demoralizing. Have some good meals, and mix it up with different types of food. On one major proposal, down the stretch for the last eight nights, we brought in food from a different ethnic restaurant every night. These small restaurants did not usually deliver until they realized we were ordering for 30 people! Be mindful of the menu, and avoid heavy meals that can make the team lethargic. On another proposal marathon, we set up several candle-light and theme dinners.
5. Have a win party celebration. Publish a WOW (Win of the Week) email broadcast giving the team the recognition and credit that they earned. Hand out plaques. Provide flowers to the Proposal Center.
6. Put up a banner or poster announcing the win and add a write-up to the company and/or local newspaper with photos of the team. After the win, post a plaque on the Wall of Fame displaying all the recent significant wins.
7. Recognize the family sacrifice of employees who are working long hours by authorizing the employee to take his/her family, spouse, or partner out to dinner on the company. Sending a note and/or flowers to the spouse is also an important gesture.

Many companies are organized in a matrix structure, and proposal teams often borrow people to help. When you find someone doing something "right" send off a quick email or a hand-written note to their boss. For exceptional work, send a note to HR or the person's supervisor to include in their Performance Appraisal. Another idea is to send a handwritten note to some spouses thanking them for their dedication and telling them you recognize and appreciate the time away.

Just a little recognition can be effective. For example, provide a gift certificate or sports tickets for the author who scored well at the Pink Team. Tack a $100 bill to the War Room wall and offer it to the author who develops the best killer graphic by close of business. Other recognition includes providing an outstanding contributor with the front-row parking space for the week or a public BZ (Bravo Zulu) button (Navy term meaning "well done"). "Often times a Public Display of Appreciation (PDA) is essential." [Drake, 2005]

A senior sales director publicly recognized me (the Capture Team Leader) with a Celtics sweatshirt that said "Red Herther #1" on the back. He knew that Red Auerbach, the famous coach of the 1960's Dynasty Boston Celtics Championship basketball team, was a strong role model of mine and so the shirt meant a great deal to me. Receiving this shirt was an honor and made me feel special and well respected. This recognition and elevated feeling made me want to drive myself even harder to win. Red Auerbach's philosophy of teamwork and role playing is very similar to creating a winning proposal team. He relied on unselfish role players. To Red, a role player was "A player who willingly undertakes the thankless job that has to be done in order to make the whole package fly." Winning proposals are full of role players. As Drucker suggested, "Managers are becoming more like coaches for a team of equals." [Drucker, 1995]

In all of these acts of recognition, the "Hot Stove" principle applies. This principle means that each member of the proposal team is provided immediate positive or negative feedback (like when you put your hand near the burner on a stove). "For recognition to be most effective, they should be sincere and timely." [Drake, 2005] Typically, I will grade a first draft and provide the result privately back to the author. Authors know that when I score their first draft as a C+, they have a long way to get to the "A" standard.

Conversely, if the section is pretty good, a B+ indicates polish is required but that the author is on track.

Some "To Do's" when praising your employees include "spontaneously, specifically (rather than generic), purposefully, privately (go to their office), publicly (in front of peers, family members, your boss), and in writing." [Kaye, 1999]

The puzzle piece shown in Figure 3 summarizes four of the key ingredients when giving effective recognition.

The Third Ring—Rewarding

Studies by Hertzberg [1968] have indicated that, while money is not a big motivator, lack of sufficient compensation can be a serious de-motivator. Too often, I believe proposal managers can be incorrectly viewed as administrators that just work the production process to get the proposal submitted. The true value of proposal managers is how they can increase Pwin. As a busboy, I quickly learned that my job was to maximize the success of others. I used to clear dishes rapidly to maximize the turns for each table. By doing this, the wait staff earned more, and I was awarded with a commission percentage against their overall tip wages. Similarly, the proposal manager should seek to maximize the salesperson's commission. Salespeople and management rarely share commissions with proposal managers or "pay for performance," but this should be changed.

A common saying is that management must want what it rewards and reward what it wants. This is particularly true on proposals. Proposal team members who significantly influence the win/loss outcome (sales, program manager, systems engineer, proposal manager, etc.) must be rewarded on the result; others, like the graphics artists and assistant proposal managers, should be rewarded on outstanding effort and output—win or lose!

Proposal managers should not just be rewarded based on effort; a component of their compensation should be based on winning. One approach is to establish a win pool bonus from which each proposal manager receives a percentage of their salary based on yearly orders/bookings results (not just win rate). This has the benefit of creating camaraderie and proposal center teamwork to help each other on all proposals.

Figure 3.

A Win Pool Bonus example would be:

- **Tier I – Achieve Orders Plan.** All Proposal Managers receive 2 percent of their yearly salary.
- **Tier II – Exceed orders by "X" percent.** All Proposal Managers receive 5 percent of their yearly salary.
- **Tier III – Exceed orders by "Y" percent.** All Proposal Managers receive 10 percent of their yearly salary.

These percentages can be adjusted based on the challenge and desired growth rates. The higher the desired Compound Annual Growth Rate (CAGR), the higher each Tier's percentage. The more proposal managers act and are rewarded like "owners," the better the results. "Pay for Performance" via a win pool bonus increases the business unit's new orders.

In the restaurant, I witnessed first hand how well this worked. At one point, the cooks were added to a similar program based on profit sharing. All of a sudden, efficiency increased, and the cooks no longer provided the busboys expensive shrimp for free! This program provided quarterly profit sharing for the specific franchise and made the employees feel like owners. "Effective managers make every employee feel like a partner. Why? Because when people feel ownership of something, they feel a strong motivation to look out for it." [Bruce, 2006]

Compensation Surveys

"Money is not the main motivator!" [Woodruffe, 2006] "Over and over, research has told us that money is not the major key to keeping good people. People want recognition for work well done. Assess your pay scale to be sure it is fair and competitive. Then praise your good people." [Kaye, 1999] So what about the money? "Americans who earn $50,000 a year are much happier than those that earn $10,000 a year, but Americans who earn $5 million a year are not much happier than those that earn $100,000 a year." Economists explain that wealth has declining marginal utility which is a fancy way of saying that it hurts to be hungry, cold, sick, tired, and scared, but once you've bought your way out of these burdens, the rest of your money is an increasingly useless pile of paper." [Gilbert, 2005]

"Americans who earn $50,000 a year are much happier than those that earn $10,000 a year, but Americans who earn $5 million a year are not much happier than those that earn $100,000 a year."

Let us benchmark the proposal manager pay scale and offer some thoughts on compensation.

APMP Nor'easters Survey

To support this article, I generated a nine-question Web survey. Thanks to the APMP Nor'easters Chapter, there were 47 responses. Even with a small sample size (targeted to proposal managers in the Northeast), this survey provided some clear insights:

1. Proposal managers are typically not paid overtime for working > 40 hours/week (96%).
2. A vast majority do not receive additional compensation for proposals won (85%).
3. Flextime for as long as 40 hours was allowed (82%).

Perhaps the most interesting results were the write-in responses to question #9—If you had an opportunity to suggest a reward practice in your company, what would you suggest?

More than 80 percent of respondents wanted a percentage of the sales commission or contract value.

While the respondents wanted to have an upside bonus on wins, they generally did not feel that win rate or win/loss ratio was the right metric to be scored against because an organizational win or loss was beyond the control of the proposal manager and included factors, such as customer relationship, product match, and price.

Some very recent proposal worker compensation data is provided with permission and courtesy of Barbara Esmedina, Communications Manager, CONEXIS. A brief

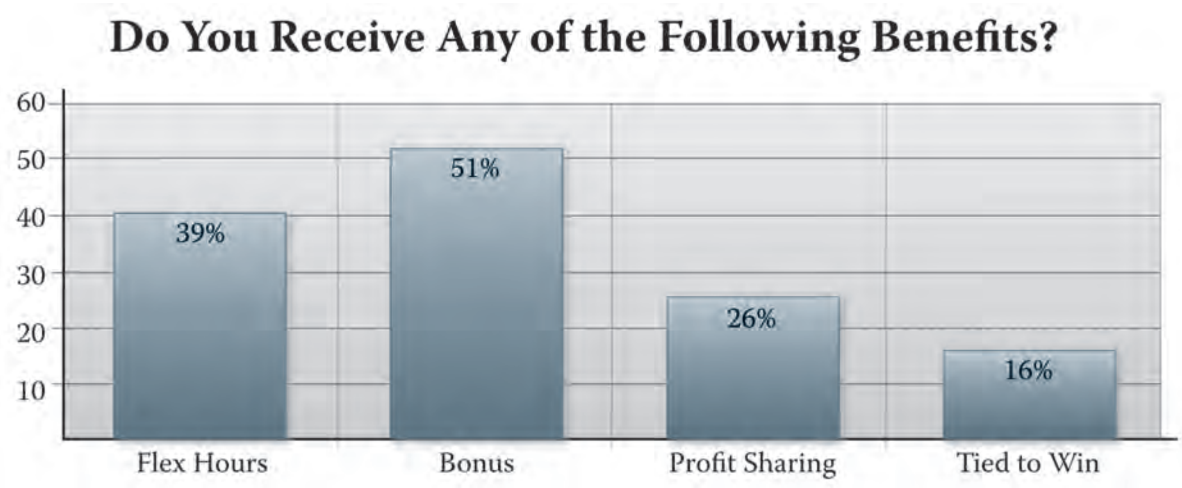


Figure 4.

summary is shown in Figure 4, and the URLs for the Websites are provided in the reference list. Currently, there are 640 respondents to the survey.

Only about 1 in 6 (16 percent) responses were tied to wins, and our informal survey said that more proposal managers would like to be part of a bonus pool or commission structure based on winning. There are also several useful Websites to view some national norms for Proposal Manager Salary—salary.com and jobstar.org/tools/salary.

In 1994, APMP conducted a nationwide survey. The survey was brief—10 questions on a single page. Findings were compiled and shared with APMP Dallas conference attendees and respondents. The results are shown in Figure 5.

To reinforce the statement that "inequitable rewards had a tremendous impact on proposal teams," author Donald Asher states that fairness does matter. "In fact, psychologists have repeatedly shown that humans would rather have nothing at all than to get an unfairly small portion of rewards."

Rewards can range from $50-$100 American Express or mall gift certificates to special recognition bonuses worth thousands. The important concept is that long hours are necessary but not sufficient basis for rewards. It is useful to set up criteria that include the number of overtime hours worked and the contribution to the effort as validated by several managers.

Another effective reward is time off with pay. A proposal consumes people's lives and is stressful on the individual and their family members. So a reward of two days, or even one week of additional paid time-off time, rewards people by enabling them to recharge and reconnect with family and friends. Sometimes even flextime and allowing people a few Fridays working from home is a reward as well. Proposal managers are professionals who must maintain a work/life balance. This technique partially pays back the lost time.

Results of 1994 Nationwide Survey of APMP Members

- Participants recognized the importance and impacts of rewards
- The majority of practices occurred **AFTER** the proposal process
- Practices were inconsistent across the industry and within companies
- Individuals were looking for fresh (and inexpensive) ideas
- Inequitable rewards had a tremendous impact on proposal teams

"Recognition is easier to give when times are good, but it is during the difficult times that people most need it."

—Bob Nelson, PhD, and Dean Spritzer, PhD

** Extracted from "Reward and Motivational Practices – An Update!"
APMP Professional Day – October 20, 2004.

Figure 5.

Common Challenges

As we have described, there are many similarities between the techniques I learned as a 16-year-old busboy and the methods for motivating, recognizing, and rewarding our employees working on proposals today. There are also some common challenges faced by both the restaurant industry and our proposal professionals.

Three common challenges that stand-out are:

1. Employee turnover can be high. Often the long hours, stress, and burn-out can make it a challenge to retain talented employees. According to one of the APMP reviewers of this article, "Yes, our members often work long hours, but we're not being professional if we pretend the system cannot be improved. To celebrate the proposal manager as HERO-AND-SAVIOR-in the-11th-hour madness is totally contrary to APMP's BD-CMM." The principles in this article can be applied to help reduce unwanted turnover.
2. Proposal professionals are underappreciated.

a. The best way to understand the value of proposal managers/proposal assistants, and graphic artists is to try to write a proposal without them! Recently I witnessed such an ordeal and the value and all-behind-the-scenes work quickly became very obvious. The #1 lesson learned at the post-mortem was to bring in professional proposal support early. Proposal managers must realize they are vital professionals with the right to demand respect and the courtesy of advanced timelines.

b. Some core proposal team members are viewed as employees who work proposals as a side job on nights and weekends. This undervalues the importance of some dedicated proposal people. Job descriptions and objectives for Subject Matter Experts (SMEs) and other personnel must include supporting proposal development.

3. Effort must be made to ensure career paths for proposal professionals. Proposal personnel often have difficulty seeing their career progression. In reality, proposal assistants can be promoted to proposal managers, and proposal managers can continue working more and larger proposals (like pinball, they get a replay) to build seniority, move up to player/coach where they manage a Proposal Center, or promoted into sales/business development/program management roles where they become capture team leaders of a campaign or a program. As Peter Drucker suggested, "Think in terms of successive assignments and chances to learn new skills." [Drucker, 1995]

The success of a proposal is directly proportional to the degree that the team effectively works. The 3-Ring Model is about winning and time-proven techniques for motivating, recognizing, and rewarding the proposal team. Make it fun! Implement the 3-Ring Model, and I will see you and your organization in the Winner's Circle!

> *"Think in terms of successive assignments and chances to learn new skills."*
>
> *– Drucker 1995*

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   REAL-TIME RESULTS: http://www.zoomerang.com/web/SharedResults/SharedResultsPasswordPage.aspx?ID=L2336TKQ7PQY

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Jay Herther has 20 years' experience leading capture teams to achieve a 78 percent win rate totaling more than $10 billion. He is the author of three articles in Proposal Management, is a proud member of the Nor'easters APMP Chapter, and has frequently presented at the National and Local APMP Chapter Conferences. Mr. Herther received the "Insight Award" at the 18th APMP National Conference. He can be contacted at Herther3@comcast.net.

...rendered graphics arrives ...ready for their first quality con-...y checks. The graphics range from ...ple pie charts to complex process graph-ics; I grab the first one in the stack and begin checking the graphics for errors. After re-viewing all of the graphics, I decide that there must be a better approach to QC graphics; a methodology that allows me to quickly and accurately check for grammar and spelling errors, and also concept and style errors. It is at this moment, accompanied by a Homer Simpson "duh-oh," that I realize I can adapt my text proofreading skills and method-ologies to create systematic approach to proofread proposal graphics—visual proof-reading.

The term visual proofreading is used in publication design to denote checking the visual "look" of a page layout, but I have adapted and expanded visual proofreading to include a three-part process for proofing graphics; first, proof the concept; second, proof the graphic; third, proof the delivery method.

...wo quantitative charts. ...of Onsite Security in each graphic.

...ith Mike Parkinson, a visual com-... expert, and together we mapped ... develop a simple yet effective ...sual proofreading. This ar-... how to combine traditional ...h design validation and ...ditorial style and a re-... workflow to ensure a ...rms to editorial and ...dated by the RFP.

Step 1: Proof the Concept

Graphics help evaluators process and retain the information contained in a proposal. "Good graphics are excellent tools for communication because readers often acquire and retain information more quickly from graphics than from text. At the same time, a poorly designed graphic can convey incorrect or distorted information." [Editorial Eye compilation, 1996] Proof the concept for the graphic, pause, and ask these questions, which determine if a proposal graphic will help the evaluator assimilate the content quickly and understand the point of the graphic [Editorial Eye compilation, 1996]:

1. Did you choose the right graphic type? (See Figure 1) The graphic's primary objective and the data or information to be communicated determine the graphic type, for example, pie charts show proportional relationships, bar charts show trends or compare quantities, and process graphics depict a workflow or process. ...you choose the correct graphic type to quickly and accurately convey your information? [Rude, 2006]
2. Is the information correct and consistent with the other graphics and the proposal text?
3. Will the graphic supplement or replace proposal text?
4. Can the reader (evaluator) interpret the graphic without referring back to the proposal text?
5. Does the graphic clearly support the writer's points?
6. Can the reader quickly grasp the graphic's primary objective? Graphics should adhere to the "10 Second Rule." The main point of the graphic should be understood in 10 seconds or less. Is the graphic overly detailed? Are there too many concepts presented in one graphic?
7. Should the graphic be included? Does the graphic have a purpose and offer value to the reader? If it is not obvious, the graphic only clouds the judgment of the reader.

Discriminator is identified.

Our Process

Figure 2. This proposal graphic clearly shows the link between feat... discriminator.

8. Is the graphic customer focused? Did the graphic link features with benefits to the customer? Were discriminators made obvious? (See Figure 2)

Step 2: Proof the Graphic

Using text proofreading methodologies and proofreading symbols to correct errors or revise a proposal graphic is the second component of visual proofreading. This part of the process applies a consistent editorial style and a repeatable proofreading workflow to ensure a proposal graphic conforms to editorial and stylistic conventions mandated by the RFP and corporate style guide. Before using proofreading symbols to make changes to a graphic via hard copy markup, ask if your graphic designer understands proofreading symbols. Learning and using proofreading symbols is not commonly taught in graphic design schools, so begin the second part of the visual proofreading process by ensuring your graphic designer knows these symbols, and can interpret your hard copy markup to implement

Common Proofreading Symbols

Symbol	Meaning
	Delete
	Delete and close up
	Insert (character or word)
	Transpose
sp	Spell out
#	Insert space
wf	Wrong font
bf	Bold face
	Lower case
	Capitalize
stet	Ignore marked correction

Figure 3. Visual proofreading uses some of the more common proofreading symbols.

changes in a propo... the most common p... graphic designers shou... Most copyediting an... contain a list of proofrea... the most widely used proo... tion books, Mark My Words i... is an excellent choice to not onl... reading symbols, but also unde... they are used.

Visual Proofreading Best Practices and Checklists for Proposal Graphics

Visual proofreading is a holistic approach to graphic QC; it combines graphic design principles and production printer checks. Visual proofreading applies a consistent visual look and editorial style, and considers the graphic's final delivery medium. Effective visual proofreading uses a repeatable and documented workflow to ensure each graphic is quality checked in the same manner and for the same errors. Checklists are the best

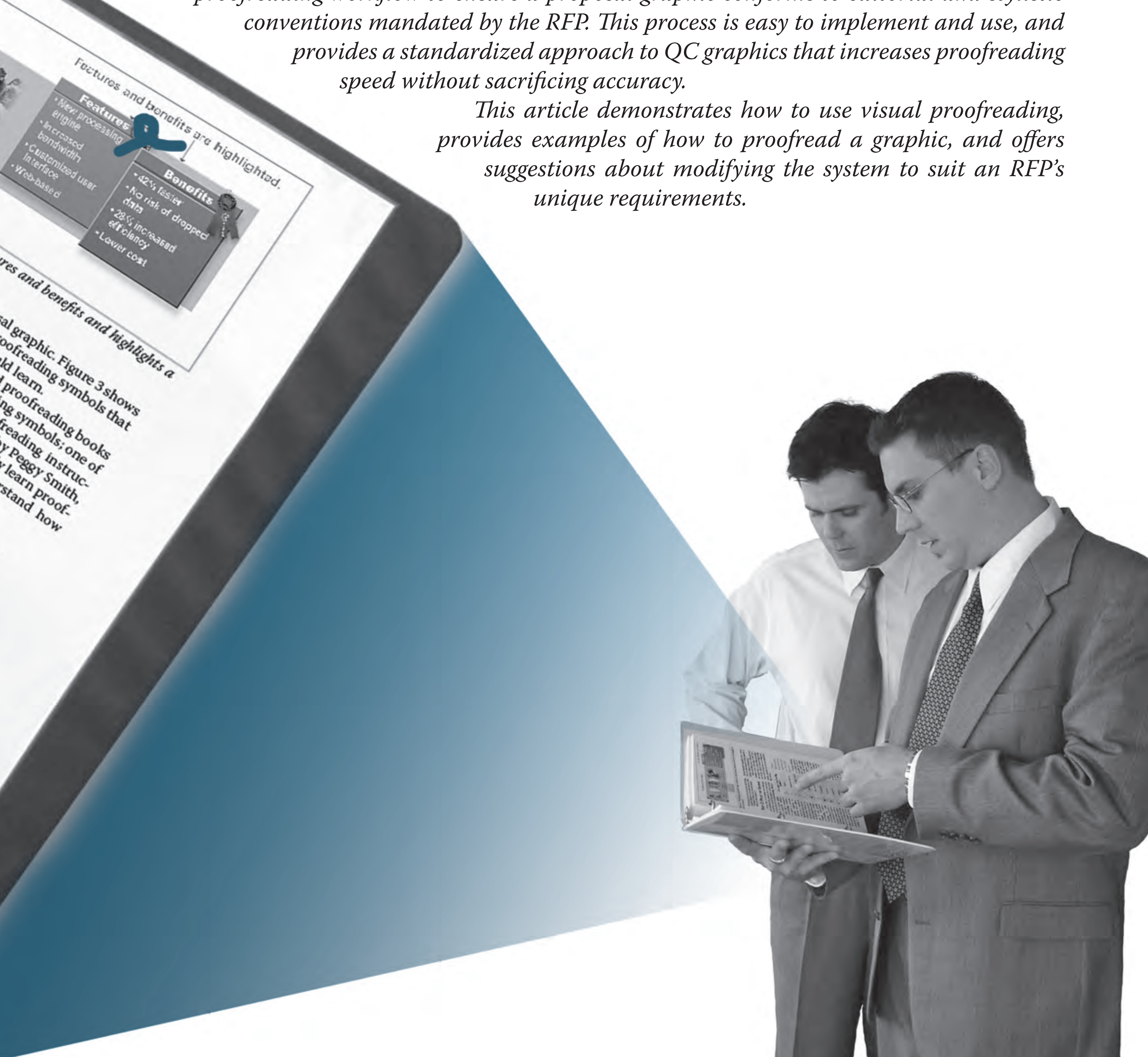
Visual Proofreading

Three Steps to Proofreading Proposal Graphics

By Ann L. Moss and Mike Parkinson

Visual proofreading is a process for graphics quality control (QC) that combines traditional proofreading with design validation and applies a consistent editorial style and repeatable proofreading workflow to ensure a proposal graphic conforms to editorial and stylistic conventions mandated by the RFP. This process is easy to implement and use, and provides a standardized approach to QC graphics that increases proofreading speed without sacrificing accuracy.

This article demonstrates how to use visual proofreading, provides examples of how to proofread a graphic, and offers suggestions about modifying the system to suit an RFP's unique requirements.



A large stack of rendered graphics arrives on my desk, ready for their first QC checks. The graphics range from simple pie charts to complex process graphics; I grab the first one in the stack and begin checking the graphics for errors. After reviewing all the graphics, I decide that there must be a better approach to QCing graphics, a methodology that allows me to quickly and accurately check for grammar and spelling errors, and also concept and style errors. It is at this moment, accompanied by a Homer Simpson "duh-oh," that I realize I can adapt my text proofreading skills and methodologies to create a systematic approach to proofread proposal graphics—visual proofreading.

The term "visual proofreading" is used in publication design to denote checking the visual "look" of a page layout, but I have adapted and expanded visual proofreading to include a three-part process for proofing graphics: first, proof the concept; second, proof the graphic; third, proof the delivery method.

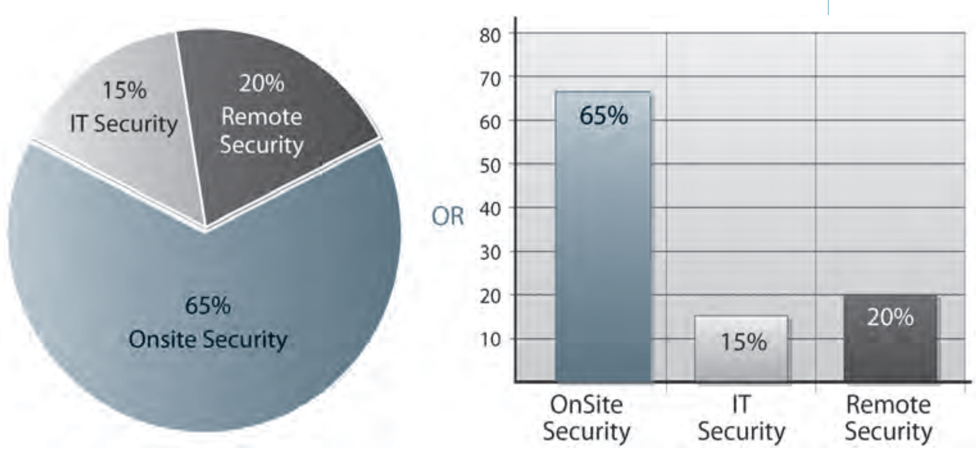


Figure 1. Compare these two quantitative charts.
Notice the relative "weight" of Onsite Security in each graphic.

I met with Mike Parkinson, a visual communications expert, and together we mapped out a plan to develop a simple yet effective process for visual proofreading. This article shows you how to combine traditional proofreading with design validation and apply a consistent editorial style and a repeatable proofreading workflow to ensure a proposal graphic conforms to editorial and stylistic conventions mandated by the RFP.

Step 1: Proof the Concept

Graphics help evaluators process and retain the information contained in a proposal. "Good graphics are excellent tools for communication because readers often acquire and retain information more quickly from graphics than from text. At the same time, a poorly designed graphic can convey incorrect or distorted information." [Editorial Eye compilation, 1996] Proof the concept for the graphic, pause, and ask these questions, which determine if a proposal graphic will help the evaluator assimilate the content quickly and understand the point of the graphic [Editorial Eye compilation, 1996]:

1. Did you choose the right graphic type? (See Figure 1 at left) The graphic's primary objective and the data or information to be communicated determine the graphic type. For example, pie charts show proportional relationships, bar charts show trends or compare quantities, and process graphics depict a workflow or process. Did you choose the correct graphic type to quickly and accurately convey your information? [Rude, 2006]
2. Is the information correct and consistent with the other graphics and the proposal text?
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7. Should the graphic be included? Does the graphic have a purpose and offer value to the reader? If it is not obvious, the graphic only clouds the judgment of the reader.

Figure 2. This proposal graphic clearly shows the link between features and benefits and highlights a discriminator.

8. Is the graphic customer focused? Did the graphic link features with benefits to the customer? Were discriminators made obvious? (See Figure 2 above)

Step 2: Proof the Graphic

Using text proofreading methodologies and proofreading symbols to correct errors or revise a proposal graphic is the second component of visual proofreading. This part of the process applies a consistent editorial style and a repeatable proofreading workflow to ensure a proposal graphic conforms to editorial and stylistic conventions mandated by the RFP and corporate style guide. Before using proofreading symbols to make changes to a graphic via hard copy markup, ask if your graphic designer understands proofreading symbols. Learning and using proofreading symbols is not commonly taught in graphic design schools, so begin the second part of the visual proofreading process by ensuring your graphic designer knows these symbols and can interpret your hard copy markup to implement changes in a proposal graphic. Figure 3 shows some common proofreading symbols that graphic designers should learn.

Most copyediting and proofreading books contain a list of proofreading symbols; one of the most widely used proofreading instruction books, *Mark My Words* by Peggy Smith, is an excellent choice to not only learn proofreading symbols, but also understand how they are used.

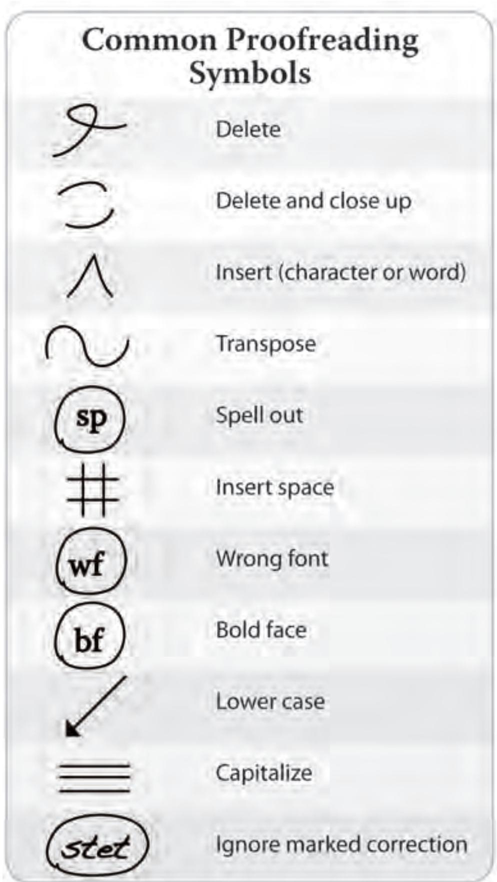


Figure 3. Visual proofreading uses some of the more common proofreading symbols.

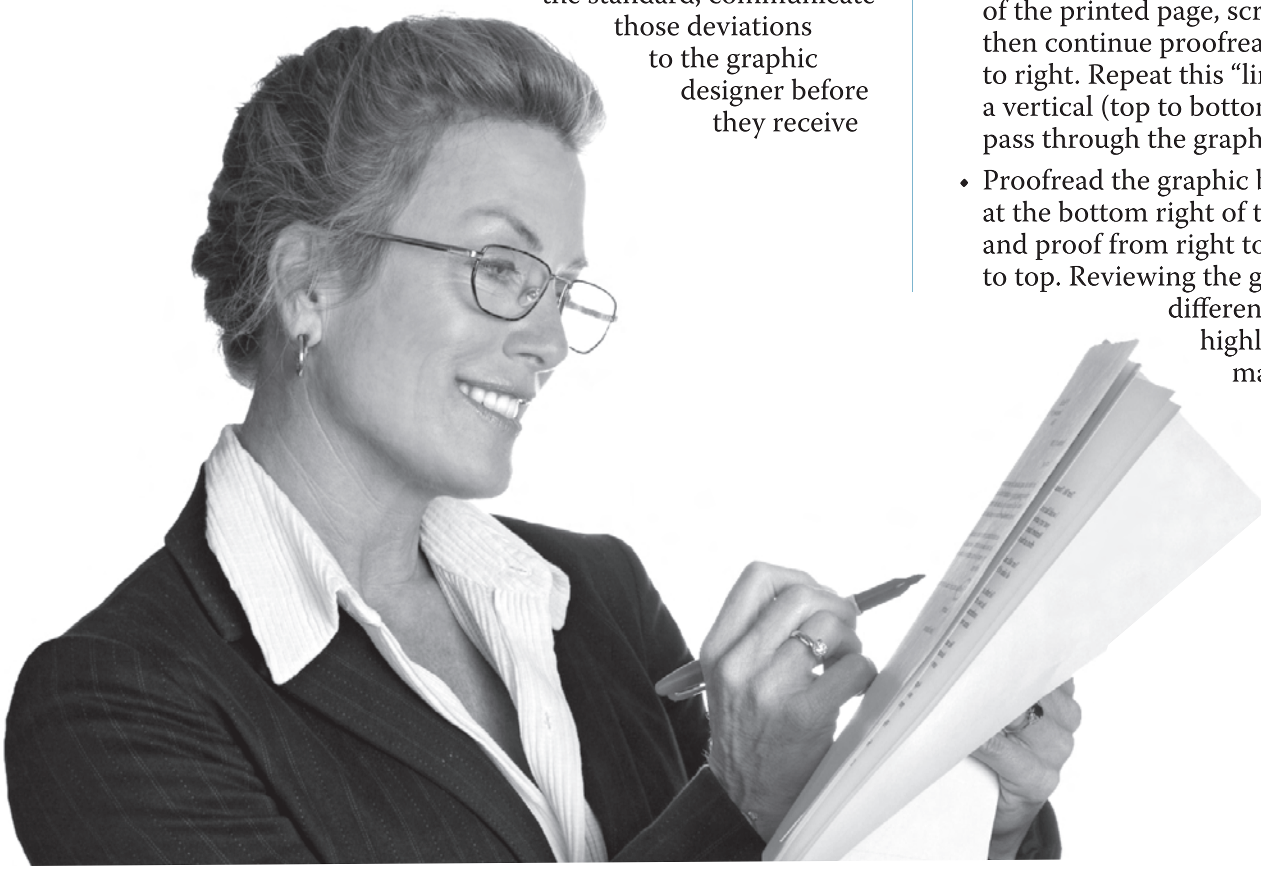
Visual Proofreading Best Practices and Checklists for Proposal Graphics

Visual proofreading is a holistic approach to graphic QC; it combines graphic design principles and production printer checks, applies a consistent visual look and editorial style, and considers the graphic's final delivery medium. Effective visual proofreading uses a repeatable and documented workflow to ensure each graphic is quality checked in the same manner and for the same errors. Checklists are the best method to track all the elements in a quality check; they are easy to develop and use, and can be quickly modified and re-used to incorporate graphic specifications contained in each RFP. The checklists in the following sections are not exhaustive, but provide examples of things to consider when proofreading graphics.

Visual Proofreading Best Practices

The following best practices provide a standardized approach to QCing graphics and increases proofreading speed without sacrificing accuracy. Some of the most valuable proofreading checklists and techniques are not contained in books, but are learned by working with highly experienced proofreaders, some of whom have generously shared their techniques for this article.

- Review the RFP for font type and point size for graphics and proposal text, leading, margins, and any other technical requirements that affect graphics.
- Use standard proofreading marks to indicate changes to a proposal graphic. If your proofreading symbols deviate from the standard, communicate those deviations to the graphic designer before they receive your markup. Good communication eliminates confusion and ensures the graphic designer can execute edits to the graphic.
- Run a spell check on all graphics.
- Proofread proposal graphics using hard copy printouts.
- Print neatly and, preferably, use a red pen to make proofreading symbols on the hard copy. In instances where red pen marks would not be visible, use a Sharpie pen or Post-it notes to make your markups.
- Modify the visual proofreading checklist to include every element being proofed.
- Make one proofreading pass per checklist item. Break down proofreading into a series of small tasks. For example, check that all the boxes on an organizational chart are the same size, then check that all the reporting lines (solid or dashed) are correctly positioned. Checking for only one design element or one editorial style per proofreading pass increases speed without hampering accuracy.
- Start proofreading at the upper left of the graphic and read horizontally from left to right, when you come to the end of the printed page, scroll down "a line" then continue proofreading from left to right. Repeat this "line scrolling" for a vertical (top to bottom) proofreading pass through the graphic.
- Proofread the graphic backwards. Start at the bottom right of the printed page and proof from right to left, then bottom to top. Reviewing the graphic from a different perspective highlights errors that may have been overlooked.



- Turn the graphic 90° left or right to check for spacing and balance.
- Look at the graphic from a distance. Stand the printed page upright, step back about three feet and look at the graphic from a greater viewing distance. An unusual viewing distance reveals shapes or color combinations that appear differently when they are viewed at normal reading distance. From a distance, you may notice unwanted emphasis or visual "weight."
- If you have proofread the graphic through several revisions and proofing cycles, you may become so familiar with the graphic that you overlook any new or remaining errors. Beat the proofreader's fatigue and ask a co-worker to proof the graphic for you.
- After a long or intense proofreading session, take a break—get out of your office chair, take a stroll, and rest your brain and your eyes. Focus on another task when you return to your office. Return to proofreading the graphic after an hour—you will be rested and have a fresh perspective.

Checklist for Proofreading Graphics

While every graphic contains unique editorial and design content, there are general proofreading rules that apply to every graphic regardless of content.

- When possible, use the final production printer to print hardcopy for proofreading. Using the production printer allows you to determine how accurately that printer reproduces color, and gives the graphic designer a chance to adjust how the printer renders the final graphic.
- Are you proofreading the correct graphic? Look for the graphic tracking number and check that number against the graphic name and callout number cited in the proposal text.
- Is there duplicate information? For example, was a box in an organizational chart duplicated without updating the content?
- Is the graphic supposed to replace proposal text, or supplement and expand on proposal text?
  - Does the graphic reinforce the proposal text?
  - Verify that the graphic does not contradict the proposal text or any tables surrounding it.
  - Is the graphic as close as possible to the proposal text that discusses it? Locating the graphic near the proposal text it illustrates increases reading retention.
- Does the graphic use the same terminology as the RFP? If the RFP refers to an "equipment burn in" period, then the graphic should not depict an "equipment break in" period.
- If the graphic contains an acronym, was it spelled out previously in the proposal text? If this is not the case, then you must spell out the acronym in the graphic.

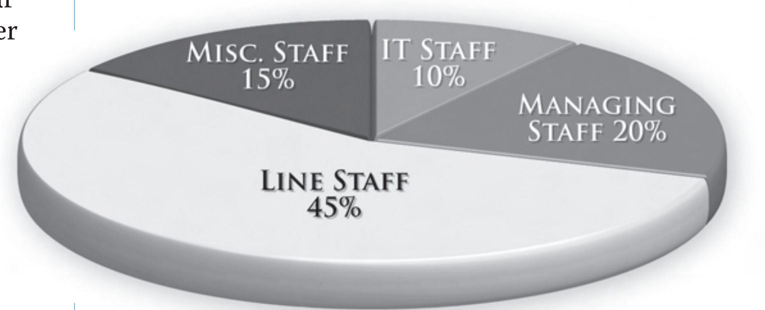


Figure 4. This pie chart illustrates how a proposal graphic can send the wrong message by incorrect emphasis on foreground detail, and contain a mathematical error.

- Are colors used consistently when denoting a department, a person, or a series of tasks?
- Does the graphic emphasize the correct details? Because the visual representation is more powerful than the numbers, most readers will not use the numbers to reinterpret what the graphic has interpreted for them. [Rude, 2006]
- If the graphic presents numbers, monetary values, or percentages, do they total correctly?
  - Figure 4 above illustrates incorrect emphasis and incorrect numerical totals. Figure 4 should communicate the allocation of staff, but because the Line Staff slice of the pie chart is in

the foreground and brightly colored, the graphic emphasizes that segment. Furthermore, the percentages only add up to 90 percent—what happened to the other 10 percent?

- Does the graphic have the correct perspective, size, and scale? Changing perspective, size, or scale drastically changes the perception of the information. Figure 5 depicts two versions of the same information.
- Do the titles and names in the graphic match other instances in the proposal text or an appendix?
- Does the graphic accurately show how you interact with the customer to exchange information and resolve problems?
- Does the graphic accurately show hierarchy? Is the customer the most or least important in the graphic?
- Are all the steps (or phases) in a process graphic numbered or in a logical sequence?
- Does your flowchart "flow"? Navigate the flowchart to check that there are no "endless loops."
- Are your visual elements labeled consistently and clearly to avoid confusion?
- Is the graphic overly complex? Is there a simpler way to show the same information?
- Is the imagery in the graphic immediately recognizable? For example, are all photographs clear and at an adequate resolution? (Note: graphics taken from the Internet are typically low resolution and copyrighted.) Are all technical images identifiable by the reader?

A customized sample checklist is shown in Figure 6 (next page). Use the previous list and the following sample list to develop your visual proofreading checklist.

Remember that errors hide in plain sight. Once a graphic is rendered, a small, overlooked error could lurk in the graphic and, when finally noticed, require additional time and money to re-do.

Figure 7 (next page) is an inexact recreation of a proposal graphic that exemplified the "hide-in-plain-sight" rule of proofreading. This proposal graphic went through four revision and proofreading cycles, the error was eventually spotted during final book check, and corrected just before the hard copies of the proposal were boxed and sealed for shipping. Can you spot the error?

The error is buried in the second row of the organizational chart, third box from the left; the person's name is Brian Johnson, not Brain Johnson.

Marking Complex Graphics for Revision

At times, proposal graphics are extremely complex and difficult to markup. So, how does a proofreader manage to condense their edits onto one piece of paper for these

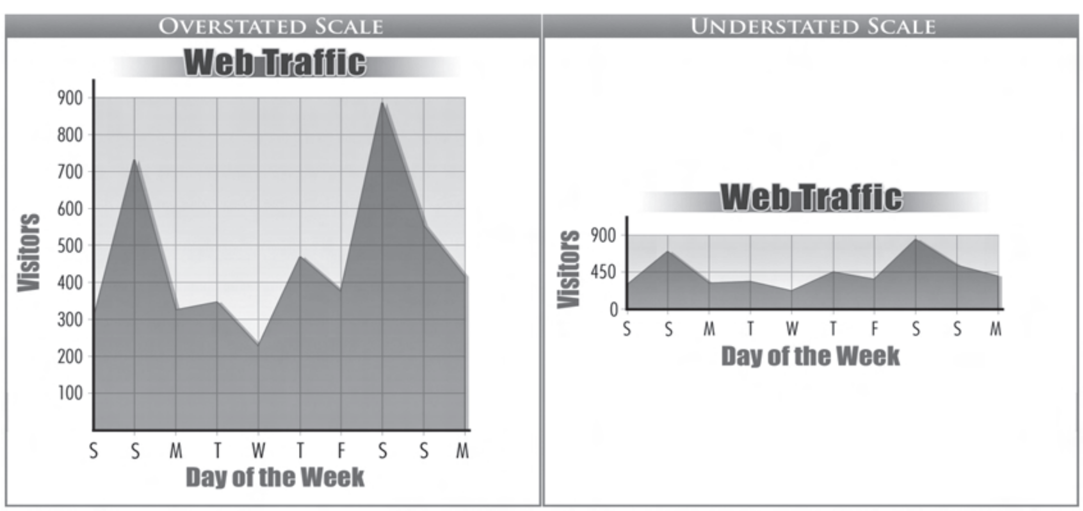


Figure 5. These graphs show that changing the scale of a graphic alters how the reader perceives information.

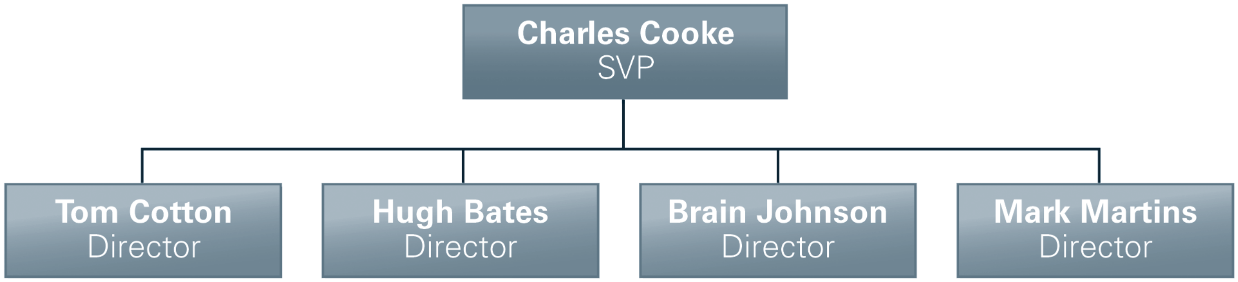


Figure 7. This chart demonstrates the proofreading rule that errors hide in plain sight.

complex, visually dense graphics? The answer is, do not condense, but expand the edits to fit on a larger paper size.

- Enlarge the graphic and print it on 11 x 17 paper, fold the paper in half (like a book), and mark the graphic for revision, one side at a time.
- Start on the left side of the paper, and mark up the graphic as normal. To make it easier for both you and the graphic designer to track and execute all the edits, number the edits, remembering to circle the numbered edits so the graphic designer does not consider the numbers as part of the revised information to be included in the graphic.
- Once all the edits on the left side of the graphic have been incorporated, flip the page over so the right side of the graphic is ready for markup and revision.
- When the edits from both the right and left sides of the paper have been made, even the oversized printed page becomes cluttered with proofreading marks. Once the graphic designer incorporates revisions from the right and left sides, return to printing and proofreading the graphic on its original sized paper (see Figure 8 on next page).

Step 3: Proof the Delivery Medium

The final step in visual proofreading is to confirm the technical parameters of your proposal's delivery medium. Your customer's specifications for final delivery affects not only how your graphics are rendered as "final," but also how much production time and resources are required to deliver your proposal. This final visual proofreading checklist ensures your graphics remain crisp and vibrant, print properly, keep files sizes low, and are tailored to fit the delivery medium.

Hard Copy Delivery

- For the best print quality, render final graphics at 200-300 dots per inch (dpi). Rendering graphics at 200 dpi often cuts file sizes in half (compared with 300 dpi). Most people cannot tell the difference between 200 and 300 dpi unless the prints are side-by-side. 200 dpi is almost always sufficient. Use 300 dpi when

Visual Proofreading Checklist

- ☐ Correct tracking number.
- ☐ Checked against the original author input.
- ☐ Graphic is clear and the main point is understood.
- ☐ Graphic is easy to follow.
- ☐ Graphic's content is consistent with other graphics and proposal text.
- ☐ Graphic uses the same terminology as RFP.
- ☐ Graphic is legible.
- ☐ Graphic can be understood in black and white.
- ☐ Spelling is checked.
- ☐ Checked for misuse of terms/acronyms.
- ☐ Values and math are correct.
- ☐ Checked for duplicate information.
- ☐ All acronyms are defined.
- ☐ Global changes made.
- ☐ Consistent graphic style (colors, boxes, arrows, shapes, and lines).
- ☐ Consistent perspective, scale, and size.
- ☐ Consistent use of icons and symbols.
- ☐ Consistent capitalization.
- ☐ Consistent line spacing.
- ☐ Correct dimensions and resolution.
- ☐ Correct file format.

Figure 6. A sample Visual Proofreading Checklist.

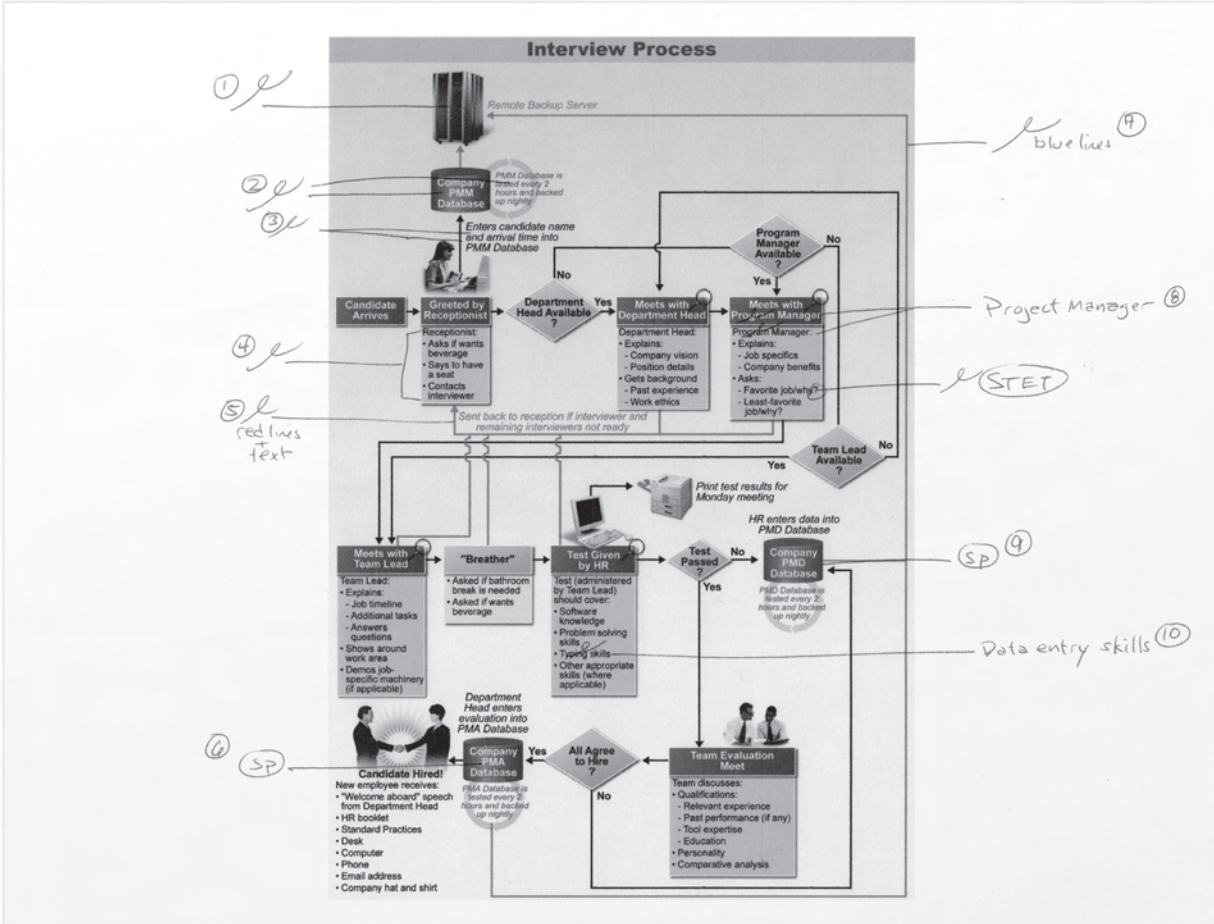


Figure 8. A sample Visual Proofreading Checklist.

working with a traditional print house or when details in the graphics need to be as clear as possible.

- Test that your network and printer can easily handle high-resolution graphics; print a single graphic with the largest file size. After all your proposal graphics are final, send them across your network as a single print job to test your printer's response time. If your production printer can easily handle the large graphic files, printing the final proposal should go smoothly. Make sure you schedule enough time to handle the inevitable printing surprise.
- Review your test prints. Check to see if your colors are close to what you expected. There are color variances from monitor to monitor and printer to printer. The only way to all but guarantee color accuracy is to use a traditional print house—if you have the budget. If a traditional print house is cost prohibitive, print your files in-house and expect that your colors will need to be "close enough" to move forward. Make a decision to use RGB or CMYK prior to rendering your graphics. RGB, or Red, Green, Blue, are the source colors monitors use to display all colors, and CMYK, or Cyan, Magenta, Yellow, and Black, are the source colors that most printers use to print all colors. RGB is recommended because RGB looks better on screen, and most printer software does well converting RGB to CMYK. In addition, RGB file sizes are smaller. However, if you are using a traditional print house, ask your print representative what they recommend.

Email Delivery

- Does the RFP specify a maximum attachment file size that will pass through the customer's firewall? Because the maximum attachment file size affects the resolution at which your graphic designer will render graphics, you should know this critical information before you create proposal graphics. If the RFP does not specify a maximum attachment file size, ask the customer to specify the maximum attachment file size during the proposal question and answer (Q&A) period.

- Save the graphics as different file types at different compression settings to ensure the smallest possible file sizes. For example, JPGs are smaller that TIFFs, and RGB is smaller than CMYK.
- Have a backup e-delivery plan. When in doubt, ensure that the maximum attachment file size for every attachment is no greater than 3MB. This restriction comes at a price. The number of graphics you include and/or the resolution of the graphics must be low.

Hybrid Delivery

The hybrid (mixed media) delivery method includes two variations: hardcopy plus email, and hardcopy plus CD or DVD. To ensure your graphics reproduce well in either method, try these suggestions.

- **Hardcopy plus email**. Use the technical parameters (file size and graphic resolution) of the backup e-delivery plan to produce and deliver the proposal. (Refer to the Email Delivery Checklist.)
- **Hardcopy plus CD or DVD**. Produce the proposal according to the hardcopy delivery checklist. (Refer to the Hardcopy Delivery Checklist.)

Conclusion

Adhering to the Visual Proofreading process guarantees effective QC for your graphics, decreases long hours and late nights, and increases the likelihood of a win. The process requires only two things: create and use a checklist, and ensure that everyone on your team is following the same methodology. Visual Proofreading Checklists are easy to implement and use, and provide a standardized approach to QCing graphics that increases proofreading speed without sacrificing accuracy. Your team then needs to follow the same QC methodology (i.e., use the same proofreading symbols, checklists, and formats) to eliminate miscommunication and costly mistakes. Do this and you, your team, and your company will greatly benefit.

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Pioneering Proposal

Management in France

By Giandra de Castro

Co–founder of Jack in the Box

In France, Jack in the Box does not sell hamburgers; it is the only proposal management company headquartered in France. It is also the name of a local hard rock group! Why call a company "Jack in the Box"? Well, why not? Can't proposal management be as simple as a children's toy?

Jack is the happy editor of Proposal Studio, a Knowledge Management (KM) development toolkit that can deliver built-to-order proposal management systems in a matter of weeks. Jack also provides consultancy services on how to build the proposals that sell and how to build a content database that helps to build highly personalized proposals.

Today, 15 companies and more than 5,000 sales people use the "proposal centers" that Jack developed for their environment. Next year, there will be more than 11,000 users, based on new orders. Over the last two years, these 15 "first movers"—15 of France's biggest companies searching for an organic growth and agile business tool—pioneered proposal management in France.

Jack in the Box just received the FAST 500 European Deloitte Consulting Award, which encouraged 68 of France's fast growing and "promising" high tech companies to look into our services.

A Brief History of Proposal Management in France

1999–2000
Initial Perspective

Why France…
Best Practices? French and/or American
Bridging the gap between spoken and written
Self destructing sales forces

2001
Understanding

French market
Possible change
Reactions to automation

2002–2003
Toes Wet

Xerox Europe
IDG "Best IT Project"
Decision Makers
Pioneers

2004
First Success

French Value Proposition
Initial Complex Projects
SFR Vodaphone
Bringing PM to sales forces
2nd IDG "Best IT Projects"

2005
Roadblocks

Slow Motion
A Year in Building

2006
Acceptance

A French Touch
Structured Tools and Methods

2007
Truth

Indirect Communication
Press and Direct Mail
Real Websites
Local APMP

1999–2000

The first questions and studies—Why is there such a gap between what people say and what people write? How can we let a sales force destroy its own sales efforts and the whole company's brand building efforts at the finishing line? Who cares about proposals in France? Who brings consulting or tools here? Is it a business issue in another country? Is there a specific word for this issue, just like there is one for KM, customer relationship management (CRM), or data mining? What are the best practices in France? What are the American best practices? Who has tried American best practices in France? Who has succeeded? Who has failed? In both cases, why? Is it true that there is an Association of Proposal Management Professionals in America?

2001

Understanding the French market—What do French companies need most? What are they ready to change? Why do they react so badly to the idea of proposal management software?

2002–2003

The first structured proposal management experience in France with an American company, Xerox® Europe—A two-month roll out in one business channel in eight countries, and the IDG "Best IT project" prize. And new questions. What kind of companies would be the best pioneers? Who and where are the decision makers? What are the right words? What are the real benefits versus what are decision makers ready to hear? Who can help promote the idea? Are journalists interested? Is marketing useful at this stage?

2004

The first successes—The very first steps in a structured French value proposition in terms of support to proposal management initiatives. The first complex projects experiences (like SFR Vodafone, or how to bring proposal management to an indirect 1,000-person sales force—and another IDG "Best IT project" prize).

2005

The first roadblocks—A full year trying in vain to build a network to promote proposal management: consulting companies, design agencies, sales training companies, CRM integrators, journalists … it seems it was still too soon. Partners proved to be slow in motion.

2006

The right way—The right "French touch" made structured proposal management methods and tools acceptable for the French culture.

2007

The year of the truth—Will companies react to indirect communication? Can press releases and direct mail work? Will it be worthwhile investing in a "real" Website? Would a local APMP chapter be successful here?

The first question raised by an emerging market is: how relevant is it to answer a need that has not been expressed?

To sum up the situation of proposal management in 2000 in France, there were no books about proposals, let alone about proposal management. No articles about proposals. No clear consulting services, let alone dedicated consulting services. No proposal management software. No proposal training. No awareness of what "proposal management" could mean, either in English or in French. Proposal management simply did not exist.

At this time, I called a foreign company that specialized in proposal management and received quite a cold welcome. "OK for sending collaterals to you, madam, but there is no way of having a sales rep come to France. And unfortunately, we cannot give you the name of a contact that implemented a proposal management solution in France."

Incredible! A no man's land for such a powerful sales booster! For a consulting, training, and software company specializing in

Alerte : *Promouvoir un concept peut coûter très cher. Assurez-vous de pouvoir vous offrir le finacement d'une campagne d'évangélisation de marché. Et soyez prêt à assumer le risque entrepreneurial induit.*

Devise : *« S'il y a bien une chose qu'un entrepreneur doit apprendre, c'est à prendre des décisions sans disposer de toutes les informations nécessaires , et sans avoir reçu les signaux d'encouragements attendus*

proposal management support, can we call it an empty, virgin market? Is there a market where there is no supplier and no buyer? This is something we do not learn in French business schools.

Some "business friends" or investors once told me "Don't try. Where there is no expressed need, there is no budget and no project manager. And where there is none of this, there is no market. And that is why there is no actor. Many companies must have tried and died. You can't go exploring unknown territories like that, all alone. Have you at least done a market survey?"

Jack's warning

"It is quite expensive to sell a concept. Be sure you can pay the price for the evangelization of the market and that you accept the entrepreneurial risks linked to that."

Jack's motto

"One thing an entrepreneur must learn is to make decisions without all the data you would like to have, or without the positive signals you would like to receive."

A market survey on a market that, as they said, does not exist?

Sometimes you just have to believe that a good thing is a good thing. And if it is so good that your seven-year-old son understands it is a good thing, go ahead. Don't be afraid. If the need for better proposals produced faster does not exist, it only means that you shall not expect an inbound call. It also means that you first have to sell the idea of "better proposals."

Challenges You Will Have to Face When Trying to Promote New Methods and Tools

The First and Main Challenge Is to Understand What Decision Makers Will Accept and Implement:

- What kind of services they will pay for.
- What kind of work habits they will change.
- What kind of tools they will accept and use.

The answers depend on how the proposal job is perceived and on the specifics of the local culture, specifically regarding sales.

In France, proposals are something you are supposed to sweat over. France is a country where intellectual tasks are highly valued. It is the country of Descartes and the French Revolution. French people have an incredibly high level of criticism and expectations. Indeed, any kind of training, method, consulting, and most of all software is perceived as "dangerous" for the personal liberty of the sales rep, or not adapted for the company, each of them being convinced of having to work differently from any other company in the world. Any "made in America" method, tool, or book is too mechanical for French needs. Even without trying, people start thinking "it won't work here."

Indeed, the persuasion paths of typical French proposals are far different from American English or English ones. For every 100 tips you read in American books or on Websites dedicated to proposal management, only two are relevant for the French way of selling.

We took a little time to understand that France is a "no software" country. Sales forces are still under the trauma of recently implemented CRM and Enterprise Resource Planning (ERP) tools that have not found adhesion yet. The idea of a one-size-fits-all tool, even if it can be customized in terms of layout and database, is still hard to sell. Only hand made, tailored-just-for-you tools are accepted. I call it the "uniqueness" syndrome: "We all have unique, specific needs that are too complicated. No software can fit."

We also understood that we first had to bring powerful techniques to "information management" before seeking to structure an efficient proposal management tool. We push all our customers towards methods like "Information Mapping©," which is the art of being read. This method is incredibly suitable for the French way of consuming information, be it persuasive or not. Persuading is another step beyond.

The second difficult thing to do in a desert is, obviously, to find and gather skillful people, and to draw the attention of specialists who recommend what you promote.

The fact is that if you want to introduce proposal management, you definitely have to be able to propose all the professional services linked to the topic, including proposal planning methods, knowledge-based construction methods, "the perfect proposal" consulting, sales force training, editing tools, graphic design, and war room support. I will let you guess how much time, effort, and money it takes to build local state-of-the-art methods and tools, and how demanding you have to be about the people who are your spokespersons.

As for drawing the attention of professionals…it is a very difficult thing in a country where there is so little sales-focused media. In France only five or six magazines or Websites talk about sales. France is a country of high-level business schools where people dream of being in Marketing or Finance. Sales is not yet considered as an Art.

In too many organizations, marketing considers the sales force as inane, just as marketing is not considered useful by sales. We still are at this point. It makes it difficult to introduce a structured proposal management process because proposals are a "no mans land" in terms of responsibility. Sales people do not want to be responsible for the project (it is a marketing job), and when marketing takes leadership of the project, they deny the relevance of the system that has been proposed.

We can say that in an emerging market, all actors are "Junior," and that is quite hard to leverage everybody at the same time.

The last, but not least, roadblock is common to any change management—fighting habits.

Fighting against habits is like David fighting Goliath. It is hard, but possible.

Habits are such a warm cocoon. You will probably be talking with leading profitable companies that will tell you: "We did not wait for you to win business. Our competitors do not do it better. By the way, we already have a tool to build proposals." The tools can be:

- A "home-made" system with obsolete data that nobody uses and that produces credibility-killing and sales-avoiding proposals
- A CRM plug-in that puts customer and price information into the one-size-fits-all product proposal template
- A price configurator that places a cover page in front of a price list and technical features.

From the expert point of view, the thing about pioneering proposal management is that you have few words to

Jack's warning
"The medicine that heals someone may kill someone else. The business model of successful American companies (what they do, how they sell) will not work if your market does not look like the American market in terms of culture and maturity towards sales techniques. Do not try to import techniques. Try to bring truly adapted solutions."

Jack's motto
"Benchmarking is not copying. Dare to bring a real value to the proposal management world."

Alerte *: le médicament qui en sauve un peut en tuer un autre. Si votre marché n'a pas la même culture vente que le marché américain ni la même maturité en termes d'outils de pilotage de la performance commerciale, ne copiez pas le business model des acteur américains du Proposal Management (ce qu'il vendent, comment ils le vendent)*

Devise *: Benchmarker n'est pas copier. Osez "penser à neuf" dans l'univers du Proposal Management* express how much you have to explain about effectiveness levers. You have to help change minds step by step, word after word, subject after subject.

From the customer point of view, the thing about pioneering is that you are afraid of the Big Mistake that will cost you time, money, and your personal credibility as a manager. It seemed that everyone had seen David Cronenberg's *The Fly*. It is the story of a man who enters a teletransportation device, something new that sounds great and that is supposed to solve a lot of problems. Unfortunately, a fly did the same. He combined genes with the fly. He got stronger and started to do great things, but ended up dead, after suffering a lot.

The proposal management market grew very slowly in France. It was a "door-to-door" business approach.

How to Select Pioneers

Do not accept a customer: Select it! If you want to pioneer proposal management, start by closely selecting the customers you want to have. All my customers are on my preferred list. I accept no project unless I know in advance it will be a clear success, it will expand from within, and it will create a positive echo in the business sphere I address.

In terms of proposal management, convincing small businesses takes much longer and is much more expensive than convincing large companies. If you do not want to kill your company before proposal management has become a "must have," you should focus only on large accounts. My smallest customer has 100 sales people using the proposal management systems we set up for them. My biggest customer will soon have 5,000. The average number is 400.

The cost of acquisition is balanced by the potential revenue. When you pioneer, you must expand with your customers before expanding with your prospects. You must give the first movers a clear competitive edge. Propose an exclusivity contract for a while. Spare no efforts for customer satisfaction. Measure the results.

We do not count our successes in terms of numbers of customers, but in terms of active users (users that produce the expected number of proposals using the systems we implement). For the same reasons, we do not "sell" the specific proposal management tools we build. We "rent" them, with all services included (hosting, support, etc.). Our customers prefer a "Software-as-a-Service" mode that makes it clear that we are all doomed to succeed, and that the proposal management project must not fail.

The ultimate ingredient for succeeding with pioneers is to make the project a corporate project, shared at the highest level. For example, Pascal Rialland, the former Director of the Indirects Business Unit of SFR Entreprises (the French Vodafone subsidiary, a national hero of organic growth) produced a six-page brochure to promote their brand

Do not accept a business:

SELECT IT!

If you have to invest in convincing people, here are my recommendations on how to select them:

- Headquartered in your country—local decision making, shortened decision cycle
- Do proposals ranging from quotes to public RFPs—a strong need for effective proposal management
- Organized in Business Units or Channels—possibility to start the project at a lower cost with one channel, one line of business before expanding within the company
- International scale—the possibility to roll out the project worldwide.

new proposal management system throughout their indirect sales channel. In this brochure, Paschal said:

Proposals are the very first "one–to–one" customer experience with a brand, and one of the last bastions of competitive differentiation. In highly competitive and perceived parity markets, it is not only what you sell, but also how you sell it that matters. Today's selling has as much to do with the right choice of products as with the right choice of words and images. Using professional tools is a powerful way to create a corporate discipline for sustaining brand building, structuring customer messaging processes, giving sales and marketing one voice, and finally, for driving brand ambition from headquarters to the sales force and customers.

Jack's warning
"If you drive too fast you may not be able to take the right turn. Proposal management is too serious a thing to be shared by too many people at a time. Select the happy few, and build success stories on the rocks."

Jack's motto
"Do not be just good at the job. It is not enough for your large accounts customers who are already excellent. You must be… brilliant."

Pascal is now General Manager of SAP France and North Africa. SAP is the recognized leader in collaborative business software and currently employs more than 42,750 people in more than 50 countries worldwide.

It is now Bertrand Mabille, CEO of SFR, who promotes proposal management as the first step in customer satisfaction. He launched the Charte Alliance SFR, which lists the 10 major commitments of SFR in terms of customer satisfaction. (See http://sfrenterprises.fr/solutions/plus-sfrenterprises/espace-sfr-enterprises/alliance/index.jsp)

Each commitment is supported by powerful tools and methods. Each one of them is measured, and those who reach their goals are rewarded. "A personalized business proposal" comes in a beautiful third place in SFR customer satisfaction commitments! All channels (indirect, bids and tenders team, large account sales force, etc.) use the SFR Business Center we have built for them. 1,000 daily users!

Of course, that does not mean that you must start your business approach at this level. Only that it must get there. In France, if we propose proposal management software or a specific tool, the "right" budgets for a proposal management project are in the hands of the IT or Communication departments. But, in reality, most of the time we create the need with sales management (less frequently with marketing management). Then we go through a complex sales cycle in order to budget the different lines of the project (design consulting, training, tools, etc.) with the support of the right people (IT project managers, etc.).

What are the right words to "touch" pioneers?

First of all, pioneers must believe in the wealth of the Promised Land. Then they must believe in you as a leader towards the Promised Land.

So write a book earlier than I did, but do it as uniquely as I did—do not translate American best sellers!!! Most of them talk about winning proposals, not more broadly about proposal management. Decision makers will not buy or trust a recipe book for a sales force. Write a management book for companies in search of organic growth. Explain what proposal management is all about. Do not sell your own services or software.

In France, I never used American books to substantiate my claims about the benefits of proposal management. Instead, I sent people to the APMP Website and showed them the

Alerte : *Si on roule trop vite, on a vite fait de louper le tournant. Le Proposal Management est un sujet bien trop sérieux pour être inauguré trop tôt par trop de pionnier en même temps. Choisissez les happy few pour consolider ensemble l'expérience réussie d'un Proposal Management local. Vous n'avez pas le droit à l'erreur et aux contres références.*

Devise : *n'essayez pas de simplement bien faire le job. Ce n'est pas assez pour des grandes entreprises clientes qui ne vous ont pas attendus pour être excellentes et leaders sur leurs marchés. Vous devrez proposer des outils et des méthodes … brillantes!*

content of the proposal expert accreditation program. I also showed them the APMP-published surveys and the proposal management magazines, as well as the list of events. It is dramatically impressive to peep into a structured proposal management world.

APMP delivers a global message to decision makers:

- Proposal management will enable you to win more and reduce the cost of sales
- Proposal management is complex enough to require professionals
- These professionals exist and know things and secrets you cannot even imagine.

To keep it short, decision makers do not navigate into Websites or books to find how to build an executive summary or demonstrate a return on investment. They just need to "feel" if it is about business or not. And the APMP Website delivers this subliminal message, without having to open a lot of documents and PowerPoint slides. It delivers a global sense of utility in a very quick tour.

As I said before, people do not really want to be the pioneers they really are. APMP shows them that other companies in their business are currently implementing such practices. And even if "foreign" proposal management methods may seem "unsuitable" for local needs, foreign proposal management examples of similar companies are more receivable!

When you start a proposal management market, you cannot pretend to have references or use another company's reference to prove that what you propose is a valuable service. APMP enables the absolute beginner to prove that proposal management is a good thing, independently of the service providers who have already proved successful. With APMP, proposal management is the hero. Companies who implemented structured proposal management are the heroes. Not the suppliers. And that is absolutely great!

For the proposal management professionals who try to promote proposal management in their countries, APMP is a fantastic resource center for proposal intelligence. But once again, these resources shall not be taken as "proposal sources," but must be appraised and adapted for local needs and practices.

In France...

We realized that it is:

- Very easy to make people theoretically understand that you cannot deliver professional results without professional methods and tools, that you cannot build a CRM on a spreadsheet, and that you cannot build a structured proposal management system shared by hundreds of people on a text editing "office" tool
- Very difficult to get an agreement that proposals can make the difference in a competitive market.

We understood that we have two kinds of buying drivers:

- Have a "visible" competitive advantage. If we say "better proposals bring better business," some sales directors say "no, better sales people, better prices, better products, and better procedures bring better business, not better proposals." Then we say: "As a leading company competing with other leading companies, how much time does it take; how much money does it cost; and how far is it possible to have visibly better products, prices, procedures, and sales force? The only thing we know is that you can rapidly deliver visibly better proposals, and that it can sometimes make the difference when the deal is not already won or already lost."
- Free up time for the sales force. With our systems, this is easy to demonstrate. When Xerox implemented our Proposal Studio for their Teleweb Division, they obtained fantastic results and a big IDG award based on "best contribution of an IT system to business performances." SFR had the same award two years later for the "most relevant IT project in the telecom world."

Expected quick wins in terms of hard euros are what really "rings a bell" for French pioneers. The first large-scale proposal management project started because:

- Increased professionalism of result + increased accuracy and consistency + more compelling selling documents +

Features of a Typical French Proposal Management–Specific Tool

Each sales rep has access to his own "space" with the right proposal methods defined for his "proposal universe," from the simplest (quote support) to the hardest (private or public proposal).

Imagine a large account sales rep selling a million euro complex project. The bid/no bid study enables the sales force to decide the level of effort to invest (or not) in closing the deal. The Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis highlights how important or dangerous the project can be.

Once their eyes are open, the sales force no longer has to focus on what to put in the proposal, but on why they will win or lose this deal. The starting point of the proposal management tool is the customer and the business issues. The tool asks the sales rep questions like a sales manager would during a sales review.

For each of the answers you give, the system will indicate what type of proposal structure is most suitable, and propose to place one or hundreds of targeted contents in one or many places in the proposal. One answer, many consequences.

As a result, by answering 10 to 100 questions in some 50 to 300 answer checkboxes, in a matter of seconds the system displays a draft on which at least 9 lines out of 10 depend on the specificities of the business case. The draft is displayed in a text editing tool that manages rights on the content. The sales force can add, modify, delete, or illustrate content with customer-specific data, but only where they are allowed to.

The output format is a perfectly layed out PDF, so if content is supposed to be protected, it cannot be altered either in the text editing mode or in the PDF. Users can work together on a proposal, with clever workflows and the right management.

The graphic output is almost perfect, with a high standard of design. French people are very demanding in terms of proposal look and feel.

If someone creates content somewhere in the proposal, he can submit it to his private, workgroup, or corporate database. Once reviewed and approved by the content manager,

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Competitive edge = **Higher hit ratio**

- Increased perceived value + increased value for price = **Protected margins, shortened sales cycle**
- Less time spent on customizing proposals = **Reduced cost per proposal + increased sales productivity**

Soft euro benefits are something pioneers experience, and were even more important than the short-term, "hard euros" they expected. The "soft euros" are the real reason why they keep the proposal management systems, independently of the real results in terms of "hard euros":

- Ensure that everyone in the company shares a common understanding of what constitutes a differentiated value proposition
- Cast a consistent "single voice" to the customer across all selling touch points
- Break down the wall between knowledge and best practices local silos
- Avoid self-styled communication (messages and image) and deliver a coherent story to customers
- Free up time for an overbooked sales force:
  - Eliminate time-consuming, repetitive tasks, such as cut and paste and manual reformatting
  - Facilitate the ongoing growth and refinement of content in order to support consultative sales
  - Concentrate sales force thoughts on the business case, not on the document
  - Help marketing to rapidly and accurately disseminate an update content to a broad audience, whatever the channel
  - Ramp up new sales force faster on sales methodology and corporate speech
  - Improve closure capacities for the "B" and "C" reps (not all reps being "A" players).

the content will be available in the same place in the proposal where it was first typed. It will be shown as additional content that can be made visible.

Once sent, proposals are locked so the customer does not have a better memory of versions than the sender. If he wants to re-use the proposal (create a second version, for example), the system will display all the data in the proposal that has become obsolete (if, for example, the reference content database has changed), and the user can select to keep or update the data.

Managers know exactly how many proposals are being sent, by region and by line of business, without anybody having to declare figures. They also know the 10 most used/least used content, by product, by market.

The proposal can be sent to an external site for printing. There is a powerful workflow to define the packaging features (type of paper selected, collaterals to add, etc.) defined with the printing company.

Once short-listed, you can convert the proposal into a presentation. "Pages long" pitches are displayed in the visual version (short, bulleted, more illustrated). Once won, you can convert the proposal into a contract with the right terms following what and how you have sold.

Conclusion

Being the first is not so easy, either for a customer or for the brave service provider. It is a huge responsibility to promote proposal management professionally, while not turning marketing or technical fluff. But it is so thrilling to face the challenge to pioneer—to face competition!!!

I am proud of participating in helping the companies of my country to share established best practices and to enhance their competition level. France specifically needs to boost the capacity of local companies to achieve organic growth in these hard times for business. Not to mention that we have this odd and weird law about weekly work time (35 hours—can you imagine what it means for business efficiency?). I just beamed when in the early years of "35 heures" Xerox France once told me that implementing our Proposal Studio was a means of compensating for the "4 hours less" of work they just had to organize in a panic. Pioneering proposal management in a country where real methods and tools do not exist is not just about entrepreneurship; it is also about citizenship!

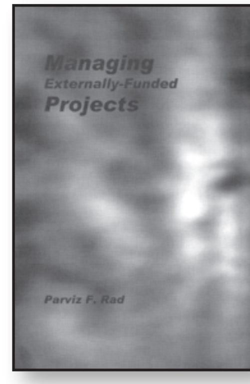
Pioneering proposal management in a country where real methods and tools do not exist is not just about entrepreneurship, it is also about citizenship!

Giandra de Castro has helped implement proposal management in France. She is currently writing the reference guide of proposal management best practices, which DUNOD Editors will publish in mid-2008. She studied in a French "A group" Business School (EDHEC). Giandra worked as Marcom Coordinator for Europe at APC, then as Resellers Channel Marketing Support in Tech Data, then as Midmarket Marketing Manager (followed by Channel Marketing Manager) at Xerox, before associating with former Xerox document specialists to build the cornerstones of proposal management in France. Together, they founded Jack in the Box, with a simple baseline: it is still simple and possible to surprise your customers, and to surprise your sales force!

Book Review

Managing Externally-Funded Projects by Parviz F. Rad

Project Management Excellence, LLC, 2007



by Kerriann Vogel, PMP

For those committed to drafting successful proposals and executing resulting projects, Parviz Rad's *Managing Externally-Funded Projects* will provide a valuable resource. This wide-ranging book covers various contract environments and externally funded project phases from proposal development to service delivery.

The book spans the intricacies of the outsourcing process, for both clients and performing organizations. Written in a clear and practical style, Rad guides the reader through a five-phase, project-friendly, customer-focused contract/project management process. He points out key differences between internally and externally funded projects, identifies the importance of detailed project plans, and provides helpful tools and practices. He promotes a formal proposal development process that "will provide consistency in crafting winning proposals."

> This wide ranging book covers various contract environments and externally-funded project phases.

All topics you would expect to find are covered in a step-by-step approach. A chapter is devoted to each phase of the procurement process, including qualifying and bidding, contract negotiations, contract award, execution and performance, progress reports and payments, change orders, and final delivery and closeout.

The book is peppered with details and definitions. It does a good job of breaking contract types into three categories (lump-sum, cost-plus, and unit-price) and listing the advantages and disadvantages of each. For example:

"The texture of the behavior of the parties on both sides of the contract, and the flexibility of their actions, will be vastly different depending on the type of contract..."

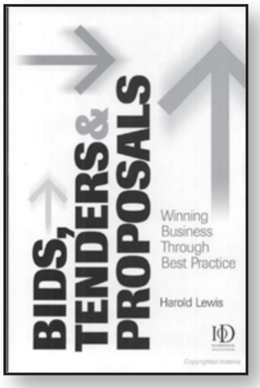
"At one end of the spectrum, the employees of the performing organization of a lump-sum contract will be intensely focused on completing the project according to the baseline plan and without any variances. At the other end of the spectrum, the employees of the performing organization of a cost-plus contract will be poised to respond to the client organizations instructions, even if these instructions represent major changes of direction."

Much of Rad's guidance focuses on careful and early planning to minimize the frequency and impact of unexpected events. The textbook-style writing is slow and dry at times, and the graphics are somewhat mundane. Nonetheless, Rad delivers solid advice on employing a Continuous Improvement Cycle and implementing a formal, extensive project performance monitoring process. Rad's experience and examples provide valuable information that can help project managers across all phases of an externally funded project.

The book refreshed my knowledge of managing externally funded projects. If you deal with such projects, and especially if you are new to them, I recommend adding this volume to your bookshelf.

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

Book Review



Bids, Tenders & Proposals: Winning Business Through Best Practices by Harold Lewis

Kogan Page (UK and US), Revised 2nd Edition 2007; US $39.95, UK £19.99

by Betsy Blakney, AM.APMP

For those of you committed to proposal management as a career, or to those professionals just embarking on the accreditation process, Lewis' *Bids, Tenders & Proposals* provides a valuable resource focused on insightful techniques and best practices that produce winning bids. His book was one of three reference materials used to form the syllabus for the APMP Accreditation Programme.

Even though the book is directed at a European Union (EU) audience, Lewis has used the terms 'bid,' tender,' and 'proposal' interchangeably throughout to allow for easier comprehension. Regardless of your skill level or country of practice, you will find the scope of his writing comprehensive, covering both public and private sector clients and bidding for research funding. To earn the APMP Practitioner-level certification, you must demonstrate in your self-assessment that you can apply best practice processes, procedures, tools, and techniques to the types of proposal/bid response circumstances covered in this book.

Regardless of your skill level or country of practice, you will find the scope of his writing comprehensive, covering both public and private sector clients and bidding for research funding.

Written in a clear and practical style, Lewis provides expert guidance on the entire process of "tendering." Topics are covered in a step-by-step approach with a chapter devoted to each phase of the process, from pre-qualifying the opportunity to building a bid team, developing and writing the bid, presenting individuals' qualifications and experience in Curriculum Vitaes versus resumes, making effective use of graphics, stating your price, producing and submitting tenders, planning and preparing (oral) presentations/interviews, and understanding how clients evaluate tenders.

The book is peppered with sage advice and reflects the views and preferences expressed by Lewis' clients. Keep in mind these statements are considered common sense by most proposal professionals; however, I agree with Lewis that we do not always see them consistently put into practice. For example:

"There is little point in submitting a bid unless it has distinctive benefits to offer the client..."

"If your bid is to have credibility, clients will want to see hard and convincing evidence that you mean to do what you say...you need to validate your claims with solid facts and credentials that you can prove."

"If the structure of the bid is specified by the client, follow it exactly. This cannot be emphasized too strongly. Do not ignore any instructions the client may give about either structure or information content. Your bid is likely to be rejected if it fails to supply fully the information the client has asked for."

Much of Lewis' guidance is communicated in the form of questions that can be converted into checklists. Pitched as food for thought, you will need to pick and choose which questions, issues, or factors apply to your specific bid opportunity. My favorite section is entitled, "How to Annoy a Bid Evaluator." The quick wit demonstrated here and throughout the book kept me engaged while I struggled from time to time with unfamiliar terminology (e.g., "concept note," "double-envelope," and "collusive tendering certificate").

Read the last chapter first. A compilation of "Ten True Stories," Chapter 25 sets the stage for a wonderful journey.

Also helpful are the chapters on bidding for public sector contracts (Chapter 2), tendering for the private sector (Chapter 3), and bidding for research funding (Chapter 4). The only other proposal reference I have found as all-encompassing is Robert S. Frey's *Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts*, 4th edition (reviewed in the 2005 Spring/Summer issue of the APMP *Journal*), where public versus private procurement processes, rules and regulations, and grant proposals are discussed in addition to the business development lifecycle.

One of the most refreshing aspects of the book is its realism. Lewis's extensive experience and real-world examples bring the text to life and provide the foundation for a useful guidebook to be referenced over and over again. This "Rinse and Repeat" approach is the tactic I use when polishing my business development/proposal skills. Even if just to refresh my knowledge by searching for a topic in Shipley Associates *Proposal Guide* or logging onto the APMP BD-Knowledge Base, this book now has a place in my professional library. I encourage you to add it to yours. If nothing else, the book will increase your awareness and knowledge of the EU procurement framework and what your international colleagues do to win business.

One of the most refreshing aspects of the book is its realism.

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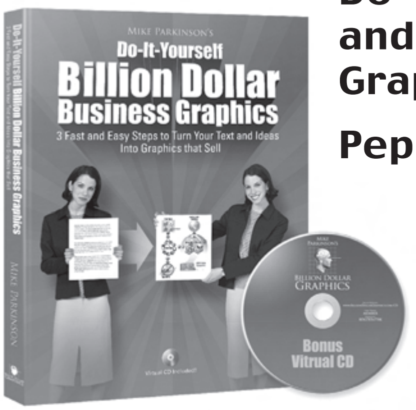
Book Review



Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Graphics into Graphics that Sell by Mike Parkinson

PepperLip Press, 2007; US $49.95

by Robert S. Frey

Just released in 2007, Mike Parkinson's handsome hardback book, *Do-It-Yourself Billion Dollar Business Graphics*, provides busy business and technical professionals with a practical and useful hands-on desktop guide to "thinking graphically." Among the considerable value-added elements is the Primary Objective, Audience, Questions, Subject Matter (P.A.Q.S.) Questionnaire, which can help anyone translate concepts and ideas into compelling, audience-centered graphic images that contribute to telling a fact-based story. Loaded with full-color designs and illustrations that bring the theoretical foundations of excellent presentation techniques to life, *Billion Dollar Business Graphics* can help you convey your business messages to customers in ways they will respond to enthusiastically (and, ultimately, in ways that influence them to make decisions and take positive action on your organization's behalf).

Graphics obviously touch us at a common core of our humanity, and are clearly a critical vector of communication in our world both today and tomorrow.

Well-conceptualized graphics can evoke enthusiasm and emotion in general. In his work, *Seeing Is Believing* (1998), Arthur Berger claims that visual images have the power to generate intense feelings and emotions precisely because they connect with people's beliefs and values. Parkinson certainly agrees, and delineates between surface (*cognitive*) communications conveyed through graphics and subsurface (*emotional*) communications conveyed via the same medium. Think of flags and eagles and the emotional swell of patriotism those images generate. Advertising understands the power of such visual images, especially in combination with verbal messages. Sandra Moriarty, professor of journalism and mass communication at the University of Colorado-Boulder, asserts that visual and verbal communication modes are *interdependent*. Visual communication may be different from language-based communication, but Professor Moriarty contends that both are equally important.

Graphics obviously touch us at a common core of our humanity, and are clearly a critical vector of communication in our world both today and tomorrow. In his book, *The Rise of the Image, The Fall of the Word* (1998), New York University journalism professor Mitchell Stephens writes profoundly that "at some point in the second half of the 20th century—for perhaps the first time in human history—it began to seem as if images would gain the upper hand over words." David Natharius, Professor *Emeritus* of Communications and Humanities at California State University, Fresno, discusses the term "visuality," or the social and psychological process of constructing the meaning of perceived visual data. Dr. Edward Tufte (described by *Business Week* magazine as the "Galileo of graphics" and by *The New York Times* as the "Leonardo da Vinci of data") explains that visual communication transcends language, culture, gender, and technology of information display. (In *Billion Dollar Business Graphics*, Parkinson includes a reference to Dr. Tufte's concepts).

My own two decades of proposal development for the Federal Government confirm how powerful and persuasive good graphics can be. I always strive to include some type of graphic on each proposal page to add visual interest and increase the reader's comprehension of the ideas being expressed. Parkinson's 149-page, full-color book is full of practical ideas and real-life examples of how such a graphics goal can be achieved. It also includes editable graphics and templates on a continuously-updated, virtual CD that can be accessed via the Internet.

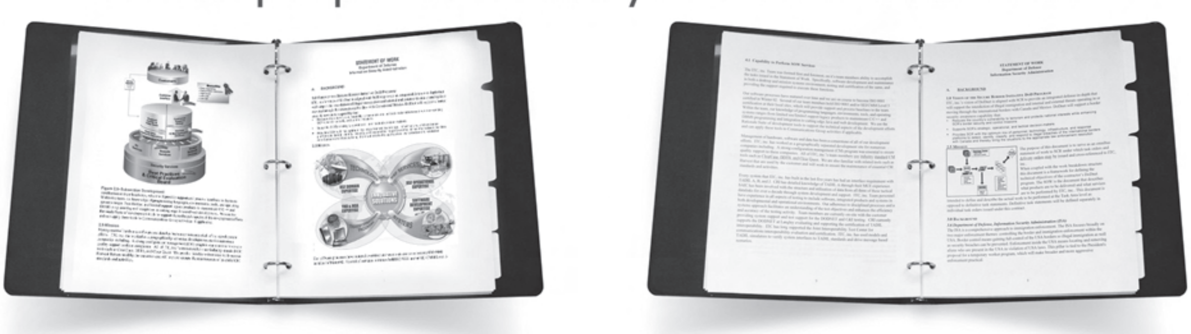
One of the most helpful aspects of this new book is that it includes multiple illustrations of how graphics concepts evolve from a raw idea to a piece of high-caliber artwork. Business and technical professionals are often challenged to visualize how rough sketches will appear in polished form, and the book supports this challenge. In addition, the book links graphics concepts and finished artwork with "primary objectives" of the graphics. These objectives include showing how a customer will benefit from a given product, explaining the roles of different companies working together, and instilling pride in a company's staff.

> *If you want to sell your products, services, and knowledge more effectively, keep Mike Parkinson's book <u>open</u> on your desk.*

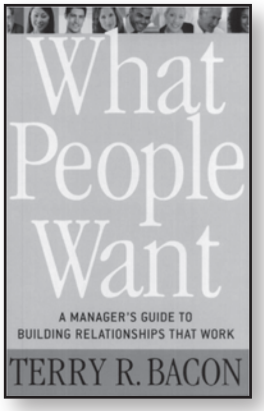
The glossary and subject index in *Billion Dollar Business Graphics* are clear and useful, as are a number of "Quick Notes" sprinkled throughout the pages that offer compelling and relevant quotes and insights into graphics communication. Such elements are beneficial additions to this already outstanding contribution to the field of practical visual communications.

Having worked in a professional capacity with Parkinson as a customer for the past seven years, I can personally attest to the compelling power of his graphics. In *Billion Dollar Business Graphics*, he has written and illustrated what he knows best. Organizations of all sizes can benefit in very tangible ways by leveraging the concepts and approaches presented in this book. If you want to sell your products, services, and knowledge more effectively, keep Parkinson's book <u>open</u> on your desk. Use it every day as you conceptualize and develop your presentations, business proposals, and marketing collateral. ***Positive results will surely follow.***

Which proposal would you rather evaluate?



Book Review



What People Want: A Manager's Guide to Building Relationships That Work by Terry R. Bacon

Davies–Black Publishing, 2006; US $27.95, Canada $34.95

by Ali Paskun, AM.APMP

Not every manager is born a people person; however, Terry Bacon believes that a manager can learn to behave like one. He also has the proof to back up that claim. What differentiates this book on management from any other I have read is that it is based on research. In a nationwide survey, Bacon asked 500 employees representing diverse groups in today's workplace to rank what they wanted from their managers. What did these employees want? According to the survey results, the answers were honesty, fairness, and trust.

What differentiates this book on management from any other I have read is that it is based on research.

Based on these findings, Bacon offers tips, techniques, and real-world examples that managers at all levels can use to give employees what they want and to develop people skills. Examples of what managers can do include:

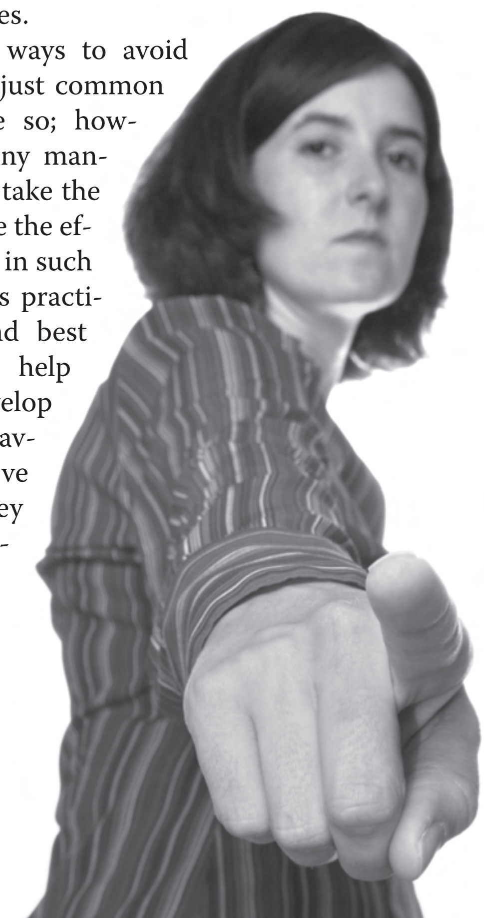
- Encouraging ideas and suggestions; giving credit and recognition when they are due
- Admitting your own mistakes; not shifting the blame
- Eliminating distractions when people are talking to you
- Having respect for what people share with you in confidence, unless it is illegal or unethical
- Delegating and giving employees the freedom to take appropriate risks.

Bacon also devotes a section in the book to discussing how managers can avoid what he calls the "dark-side temptations" to ensure "your behavior as a manager reflects the finer aspects of your character." In other words, what do managers want for themselves? The answers include:

- Respecting yourself and your boundaries; learning to say "no"
- Trusting your instincts
- Being proud of your accomplishments
- Taking time to nurture yourself
- Having a sense of humor about yourself.

And what if you turn to the dark side? Bacon describes "different styles of dark side leadership…and how to avoid these kinds of behaviors." These styles include Periscope Leader Types, Lone Wolf Leader Types, Deceiver Leader Types, and Bridge Burner Leader Types.

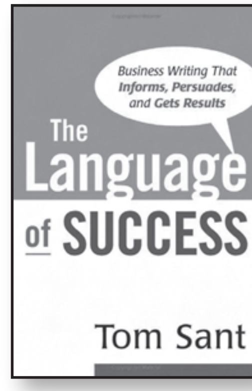
Are these ways to avoid the dark side just common sense? Maybe so; however, how many managers actually take the time and make the effort to behave in such ways? Bacon's practical advice and best practices can help managers develop skills and behaviors that achieve what both they and their employees want.



Book Review

The Language of Success: Business Writing that Informs, Persuades, and Gets Results by Tom Sant

American Management Association, 2008; US $15.00



by Ali Paskun, AM.APMP

"This book is about words, about the damage that can be done when they are used ineffectively, and about the power to be gained when they are used well." This first sentence from the Introduction of Tom Sant's latest book sums it up perfectly. In this latest publication, he has taken us back to the basics, and what an enjoyable journey it is.

Through out the book, Sant offers examples of what works and what does not in business communication. Some examples will absolutely make you cringe. It is impossible not to read the definitions and examples without seeing yourself in them. At times it seems as though the book was written because Sant peeked at your documents and wanted to personally show you a better way to communicate. Fortunately, Sant's humorous and conversational style demonstrates how easy the language of success can be.

> *It is preferable to write in a simple manner devoid of complicated, highly technical phrasing.*

He focuses on writing emails because they are a primary method of business communication throughout the world. The book begins with eight tips that will immediately help you write concise, targeted emails. Sant then demonstrates that most writers fail to deliver their intended message because they are in the habit of using one or more of four "pseudo-languages." These languages that impede success are:

- **Fluff** – clichés and unsubstantiated claims
- **Guff** – complex words and complicated sentences
- **Geek** – focus on technical details and overuse of jargon or acronyms
- **Weasel** – qualifying statements to avoid responsibility.

It is one thing to recognize the problem; it is another to know the solution. The chapters dedicated to "the principles" and "the practice" are the prizes. Too often, writers forget to consider their audience or the purpose of their message.

The *principles* are a reminder not to begin writing until you have identified your intended audience and understand the best way to target a clear and concise message to that audience. That chapter also includes a list of commonly confused words—something needed by anyone who relies in some way on the spelling/grammar checking feature in their word processing software program.

The *practice* is how to use these core principles of successful language to improve your writing and become a better communicator.

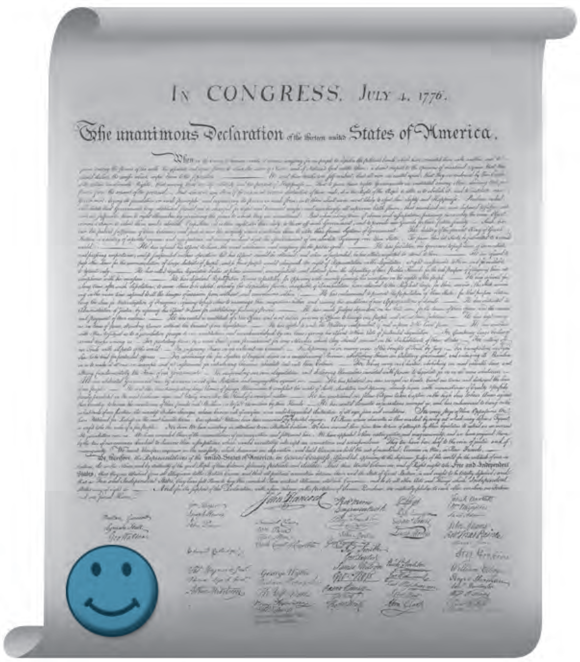
In summary, Sant's book demonstrates that it is preferable to write in a simple manner devoid of complicated, highly technical phrasing. Instead, one should use best practices and lessons learned that help the writer seamlessly transition to best-of-breed fundamentals which ensure he or she is uniquely qualified for success in future writing endeavors!!!!!!!!! ☺ (Now, was that "fluff" or "guff"?)

Proposal Professionals and the Pursuit of *Happiness*

by Jayme A. Sokolow, Ph.D.

From the ancient Greeks to the present, we have debated the meaning of happiness. Today, there is a renewed interest in this subject from economists, political scientists, and psychologists. What makes people happy, and how might proposal professionals achieve a feeling of well-being inside and outside the workplace?

The Pursuit of Happiness



Happiness is an elusive but widely used word. If you ask people what they want more than anything else in their lives, most will simply answer, “happiness.” And if you ask parents what they want more than anything else for their children, the answer is very similar—“to be happy.” Happiness is even enshrined in our Declaration of Independence, which grandly announced that it was self-evident that all men were “endowed by their Creator with certain unalienable rights” that included “life, liberty, and the pursuit of happiness.”

Happiness may be an intangible concept, but, for the past 2,000 years or so, philosophers, economists, and psychologists have energetically discussed and debated the meaning of this word. Over the past decade, there has been an explosion of research into what makes people happy that should be of great interest to proposal professionals. We all want to be happy, but many of us probably wonder whether there is any compatibility between achieving happiness and the day-to-day pressures and anxieties associated with the fast-paced and high-stakes world of proposal development.

To explore how proposal professionals might achieve happiness inside and outside the workplace, I first will briefly examine changing concepts of happiness from their origins to the present. Then I will summarize some of key findings about what makes people happy from the fields of economics, political science, and psychology. Finally I will apply these findings to the field of proposal development.

My examination of the concept of happiness is politically non-partisan and unrelated to upcoming elections, political parties, political candidates, political belief systems, or legislation. My analysis, however, will address contemporary social, political, and economic conditions in the United States, and I will propose alterations to the way we now live and work that have political implications.

A Very Short History of the Concept of Happiness

The meaning of happiness has changed dramatically from the ancient Greeks to the present. Greek thinkers differed about the meaning of happiness. Some of them thought our lives depended on the fortune or wrath of capricious gods, while others considered life cruel and unpredictable, and thus happiness could only be reckoned at the end of life.

In Athens, philosophers began arguing that individuals might be able to attain happiness. Socrates probably was the first major thinker to argue that individuals could achieve happiness, a “powerful and unpredictable force,” if they pursued a life of virtue, which to him was the highest aim of life. Aristotle, Plato’s most famous pupil, agreed with Socrates. The Romans followed Aristotle in arguing that happiness was the virtue of a well-balanced person.

The early Christians concurred with their pagan predecessors that true happiness was the “gift of God,” in the words of St. Augustine, but they doubted whether most people could achieve it on earth. Throughout the Middle Ages, Christians considered happiness only attainable in paradise or at the end of time. Since the Fall, unhappiness was the natural condition of a sinful humanity.

As Renaissance thinkers rediscovered Aristotle and classical thought, however, they began re-evaluating the potential for happiness in this life more positively. The concept of happiness, however, only became fully rehabilitated during the 18th century Enlightenment when thinkers boldly argued that suffering was not an inevitable consequence of life. Rather, happiness was a natural right that everyone might attain.

The French Declaration of Rights of Man and the Citizen (1789) heralded this intellectual and political revolution when it proclaimed that government should strive for the "happiness of everyone." Four years later, the new French constitution stated that the "goal of society is common happiness." By the end of the 18th century, the concept of happiness had developed into a powerful democratic appeal with its emphasis on earthly contentment.

The goal of happiness became increasingly popular during the 19th century. Throughout this period, happiness lost its traditional association with virtue and instead became equated with economic advancement and increased opportunity.

Our attitudes about happiness have basically remained unchanged since the last century. In national and international surveys, most people indicate that they believe in happiness, even if they have trouble defining it. As Vladimir and Estragon plaintively lament in Samuel Beckett's famous play, *Waiting for Godot* (1953):

"Vladimir: Say you are, even if it's not true.

Estragon: What am I to say?

Vladimir: Say, I am happy.

Estragon: I am happy.

Vladimir: So am I.

Estragon: So am I.

Vladimir: We are happy.

Estragon: We are happy. (Silence.) What do we do now, now that we are happy?"

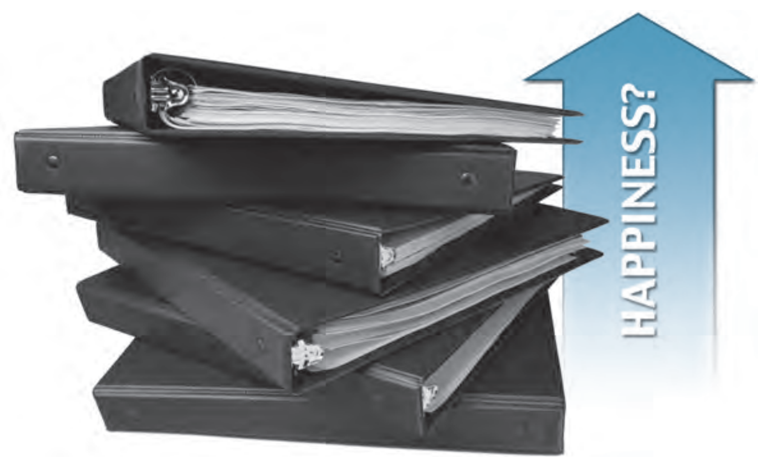
Estragon has posed an important question. Now that happiness is available to everyone, what does it mean today, and how are we supposed to attain it?

Measuring Happiness

Although happiness means different things to different people, most of us equate it with joy, exuberance, satisfaction, well-being, and peace of mind. While happiness is a completely subjective feeling, it can be measured with reliability and validity on two different kinds of self-rated surveys. Surveys about happiness focus on sort-term situations while surveys about life satisfaction take a much longer view. The World Values Survey, the European Values Survey, the US Social Capital Benchmark Survey, and surveys in individual countries provide us with detailed data about individuals' feelings of happiness and life satisfaction.

For example, the US General Social Survey has asked the following question about happiness almost every year since 1972: "Taken all together, how would you say things are these days. Would you say that you are very happy, pretty happy, or not too happy?" In the World Values Survey, respondents are asked to provide a numerical answer from 1 (dissatisfied) to 10 (satisfied) to the following question: "All things considered, how satisfied are you with your life as a whole these days?" These same surveys also ask very specific questions about what makes respondents feel happy.

These studies have gathered an immense amount of demographic data about such categories as age, sex, and occupation. One survey in 1965 involved 23,875 people in 11 countries, while another examined data from 163,538 respondents in 16 countries from 1980 to 1986. They provide us with considerable information about the relationship between demography and subjective well-being.



Today, we also can measure happiness through certain types of brain activity by correlating EEG measurements with feelings. Positive feelings are directly correlated with increased electrical activities in the left front brain while negative feelings produce increased electrical activity in the right front brain. Even in newborn babies, happy activities, such as sucking on a pacifier, set off electrical activity in the left front brain while unhappy activities, such as sucking on a pacifier with a sour taste, produce the same result in the right front brain.

This pattern remains constant through adulthood. People with active left front sides of their brains smile more and report more positive feelings and memories than adults with active right front brains. Many happy people probably have a brain chemistry that is conducive to happiness and biological parents with a predisposition to happiness. Because about half of our personality traits derive from our genetic inheritance, biology and luck play an important role in our pursuit of happiness.

The study of the human brain confirms two important characteristics of happiness. First, happiness can be measured objectively by certain kinds of brain activity. Second, what people think they feel and what people actually feel about happiness is really the same thing.

The World Values Survey measured trends in happiness levels in 24 countries from 1946 to 2007. The most extensive data comes from the United States, and it shows that from 1946 to 2006 the level of happiness in the general population has not increased. However, a subset of the data indicates a slight downward trend from 1946 to 1980 and a slight rising trend thereafter. Britain has a similar profile. In addition, the percentage of Americans who report being "Very Happy" has been slowly declining.

Other countries show a rising trend in happiness. The places with the most steeply rising levels of happiness are India, Ireland, Mexico, Puerto Rico, and South Korea, while countries with rising levels of happiness include Argentina, Canada, China, Denmark, Finland, France, Italy, Japan, Luxembourg, the Netherlands, Poland, South Africa, Spain, and Sweden. Three countries—the United States, Switzerland, and Norway—show no changes in levels of happiness, while four countries—Austria, Belgium, the United Kingdom, and Germany—show a slight downward trend.

In general, people in wealthy countries are more likely to report greater subjective well-being than people in poorer countries. These nations also have other important characteristics in common—human rights, equality between people, political stability, and high levels of interpersonal trust.

The World Values Survey and other studies enable us to determine what makes people happy in the US. According to Table 1, which is based on a survey of 900 working women in Texas, on a 1 (lowest) to 5 (highest) scale, women rated sex the highest and commuting the lowest activity. Working ranked just above commuting on the bottom of the scale.

Activity	Average Level of Happiness*
Sex	4.7
Socializing	4.0
Relaxing	3.9
Praying/Worshipping/ Meditating	3.8
Eating	3.8
Exercising	3.8
Watching Television	3.6
Shopping	3.2
Preparing Food	3.2
Talking on the Telephone	3.1
Taking Care of my Children	3.0
Computer/E-mail/Internet	3.0
Housework	3.0
Working	2.7
Commuting	2.6

*Scale of 1 (lowest) to 5 (highest)

Table 1. Working Women in Texas Rank Happiness Levels of Daily Activities

In Table 2 (previous page), these same women ranked their levels of happiness while interacting with different people. Socializing with friends and family ranked the highest while being alone and talking to their bosses produced the lowest levels of happiness on scale of a 1 (lowest) to 4 (highest).

Interacting Activity	Average Level of Happiness*
Friends	3.7
Relatives	3.4
Spouses/Partner	3.3
My Children	3.3
Clients/Customers	2.8
Co-workers	2.8
Being Alone	2.7
Boss	2.4

*Scale of 1 (lowest) to 4 (highest)

Table 2. Interaction and Happiness Levels Among Working Women in Texas

The US General Social Survey asks people how happy they are and what parts of their lives produce different levels of happiness. Based on their answers, we can identify seven factors in the United States that greatly affect people's level of happiness. In Table 3, the first five factors are listed in descending order of importance.

Factors
Family Relationships
Financial Situation
Work
Community and Friends
Health
Personal Freedom (Important but Unranked)
Personal Values (Important but Unranked)

Table 3. Major Factors Affecting Individual Happiness in Order of Importance

The results of the US General Social Survey have been duplicated in other national surveys and in other countries. Family relationships and the quality of our private lives are the key factors that affect our level of happiness and sense of well-being. This can be demonstrated by looking at Table 4, which is based on 2003 data from more than 90,000 people in 46 countries. On a scale of 1 (lowest) to 10 (highest), respondents ranked events that decreases their happiness. The events that elicited the highest ratings were separated (rather than married), unemployed (rather than employed), and health.

This data demonstrates that family relationships account for substantial differences in levels of happiness. Unemployment is disastrous for many individuals not so much because of the loss of income but because of the loss of work, which destroys self-respect and the social networks created on the job. Finally, people care greatly about their health, although healthy individuals tend to overestimate the loss of happiness that people actually experience from serious medical conditions, with the exceptions of chronic pain and mental illness.

Event	Fall in Happiness*
Financial Situation	
Family Income down by one-third	2
Family Relationships	
Divorced (rather than married)	5
Separated (rather than married)	8
Widowed (rather than married)	4
Never Married	4.5
Cohabiting (rather than married)	2
Work	
Unemployed (rather than employed)	6
Job Insecurity (rather than security)	3
Community and Friends	
"In general, people can be trusted" (percentage saying yes down by 50 percent)	1.5
Health	
Subjective health down 1 point on a 5-point scale	6
Personal Freedom	
Quality of Government	5
Personal Values	
"God is important in my life" (you say no rather than yes)	3.5

*Scale of 1 (lowest) to 10 (highest)

Table 4. Effects of Events on Individual Happiness

Can Money Buy Happiness?

Until recently, economists assumed that a person's material circumstances drastically affected his or her subjective well-being. This has translated into the popular notion that money can buy happiness. However, recent studies by economists have refined this assumption about the relationship between wealth and subjective well-being.

It is true that regions and countries with the highest standards of living in the world—Western Europe, Scandinavia, Canada, the United States, and New Zealand—tend to score highest on happiness surveys. It also is true that within countries, there are differences in perceptions of happiness that are correlated with income.

As Table 5 indicates, in the United States 45 percent of respondents in the top quarter of income indicated that they were "Very Happy" as opposed to 33 percent in the bottom quarter. While only 4 percent of the top quarter stated that they were "Not Too Happy," the figure increased more than three times to 14 percent for the bottom quarter.

In Britain, comparable figures were 40 percent and 29 percent in the "Very Happy" category and 6 percent and 12 percent in the "Not Too Happy" category. Within a given country, people who earn more money usually are happier than those far below them in income. This trend supports the contention of Woody Allen that "Money is better than poverty, if only for financial reasons."

However, there are limits to the amount of happiness that money can buy, and it diminishes as individuals earn more income. Although per capita incomes have changed dramatically, levels of happiness as measured by surveys have not appreciably changed.

Since 1950, living standards have doubled in the United States, but the percentage of people in the "Very Happy" category has not increased. In Japan and Britain, the same is true. It seems that when people become wealthier in comparison to others in the same country, they become happier. But when countries become richer, the aggregate level of happiness does not increase.

Economists provide several explanations for this seemingly puzzling trend. First, they have argued that increases in income beyond an average per capita income of $10,000 per year (in the United States, average per capita income is $37,500) have little affect on happiness because monetary increases have a diminishing utility. If I earn $25,000 a year, receiving a $5,000 raise may enable me to purchase a home or health insurance for my family. But if I earn $100,000, receiving a $5,000 raise will not change my life very much.

As Daniel Gilbert, a Harvard University psychologist and the author of the best-selling *Stumbling on Happiness* (2005), has pointed out, "Wealth may be measured by counting dollars, but utility must be measured by counting how much goodness those dollars buy. Wealth doesn't matter; utility does." As income rises, dollars usually do not purchase increased pleasure. Extra income provides extra happiness for the poorest part of the population. Extra income provides diminishing happiness as you get wealthier because you already are living comfortably. People often over-estimate the utility that they will receive for their dollars and tend to be overly optimistic about its impact on their lives.

Take my neighbor, for example. He is an excellent craftsman who spent months at great time and expense enlarging his kitchen and dining room. When I asked him if his wife and two young children were excited about the new addition, he smiled and said that the excitement had completely disappeared after one week. They had quickly become habituated to their new surroundings and no longer considered the addition very special. Their subjective experience of diminished utility was disappointing to him, but this is common. We often equate wealth and material improvement with increased utility, but more money and possessions do not necessarily increase our happiness or pleasure on the scale that we anticipate.

A second explanation is comparative in nature, as the British economist Richard Layard has argued in *Happiness: Lessons from a New Science* (2005). Many people believe that relative, not absolute, income matters the most. In other words, my income does not

Ratings	Percent (%) United States		Percent (%) Britain	
	Top Economic Quarter	Bottom Economic Quarter	Top Economic Quarter	Bottom Economic Quarter
Very Happy	45	33	40	29
Quite Happy	51	53	54	59
Not Too Happy	4	14	6	12
Percent (%) Total:	100	100	100	100

Table 5. Happiness and Income in the USA and Britain

automatically make me happy, but a comparison between my income and those below me might. As H.L. Mencken once quipped, a "wealthy man is one who earns $100 a year more than his wife's sister's husband." If you are making more money than your neighbor, you may feel happier.

Whether or not you are happy with your income depends on the norm that you use as a yardstick. For many Americans, that norm is based on two factors—what you are used to earning and what other people you know earn. The first factor depends on habituation and the second on social comparisons. That is why economic growth does not automatically generate greater feelings of well-being. As our incomes increase, so do our expectations.

In addition, when given a choice most people choose economic security over a higher income. As Table 6 shows, in a 1993 survey on the "very important" aspects of money, "security," and "being able to help your children" came out on top while "pleasure" was rated lowest.

Category	Percent (%)
Security	78
Being Able to Help your Children	63
Comfort	62
Freedom	58
Pleasure	45

Table 6. "Very Important" Aspects of Money

If our desires and standards of comparison increase as rapidly as our material achievements, then increases in income are unlikely to enlarge our sense of subjective well-being. At the bottom of the economy, the poor and near-poor will benefit from economic growth because for them more money does buy happiness. But for the middle and upper classes, only the hedonistic treadmill lies before them. As the Red Queen says in *Alice in Wonderland*, "it takes all the running you can do to stay in the same place." This is why impressive increases in the standard of living have not made Americans happier today than 50 years ago.

The Role of Social Capital in Happiness

If money does not increase happiness very much beyond about $10,000 annual per capita income, what does? The answer—social capital—may surprise you. In 2000, Robert D. Putnam, a political scientist at Harvard University who specializes in the study of democracy in Europe, published a best-seller titled *Bowling Alone: The Collapse and Revival of American Community*. In this fascinating study of changing American behavior, he helped popularize the concept of social capital as a major predictor of satisfaction.

When individuals make connections and work together, their neighborhoods and communities benefit.

In the words of Putnam, while "physical capital refers to physical objects and human capital refers to properties of individuals, social capital refers to connections among individuals – social networks and the norms of reciprocity and trustworthiness that arise from them. In that sense, social capital is closely related to what some have called 'civic virtue.' The difference is that 'social capital' calls attention to the fact that civic virtue is most powerful when embedded in a dense network of reciprocal social relations."

Social capital has an individual and collective dimension. On the individual side, people make connections that benefit themselves. For example, job seekers often "network" to find employment because most of us get jobs not because of what we know but because of who we know. Social capital usually trumps human capital when seeking employment.

On the collective side, when individuals make connections and work together, their neighborhoods and communities benefit. Social connections foster reciprocity, trust, and cooperation. That great philosopher Yogi Berra understood the value of social capital when he advised that you should "always go to other people's funerals – otherwise they won't come to yours."

Social networks may include your extended family, the members of your church, your neighborhood association, the local bridge club, your colleagues at work, an alumni organization, or a local music society. All of them serve as the glue that helps bond us in a large, impersonal, and complex society like the United States.

Although social networks can have negative consequences, such as religious sectarianism, intolerance, and corruption, the US states, countries, and regions of the world with the highest levels of social capital foster more mutual support, trust, cooperation, and institutional effectiveness than places with lower amounts of social capital. Putnam's point is that social capital makes a big difference in our sense of well-being.

Based on the research of Putnam and other scholars, we can pinpoint the specific kinds of social capital likely to promote a sense of happiness. Marriage is extremely important. As John F. Helliwell and Putnam point out, despite the high rates of separation and divorce in the United States, "being married increases both life satisfaction and happiness, especially when the alternative is being separated or divorced." The impact of cohabitation, as opposed to marriage, is positive, but not as strong as marriage. "Contrary to what is sometimes believed, we find that marriage appears to increase subjective well-being equally among men and women."

Contrary to what is sometimes believed, we find that marriage appears to increase subjective well-being equally among men and women.

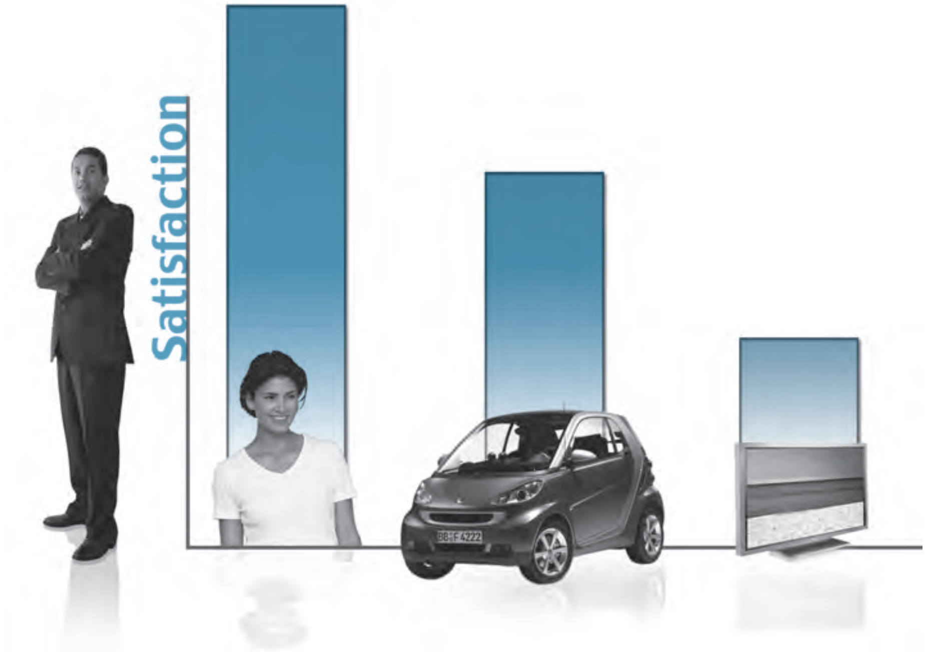
Marriage and children have a major affect on adult social networks. Parents are much more likely to be involved in religious activities and community organizations than people of the same age and social status that are either not married or childless. Married couples with children tend to be active volunteers, although they may spend less time socializing with friends and neighbors than their non-married peers. Putnam argues that marriage is so important to subjective well-being that it is the happiness equivalent of quadrupling your annual income.

Marriage is the greatest source of well-being for most adults because it provides emotional and material support along with companionship. In surveys, individuals rate their spouses as far higher sources of satisfaction than parents, siblings, same-sex and opposite-sex friends, children, work associates, and neighbors.

Family, friends, and neighbors also play an important role in our feelings of happiness. Throughout the world, people report that good relationships with family and friends are important to their happiness, far more important than money or fame. In both US and Canadian surveys, frequent and positive interactions with family, friends, and neighbors are directly associated with the highest assessments of happiness.

People with close family members, friends, neighbors, and co-workers are less likely to feel sad or lonely than those with weaker social connections. They often have a greater sense of self-esteem too. Friendship may be increasing in importance as a prerequisite for subjective well-being because divorce, geographical mobility, and smaller families may be reducing the importance of family ties, especially for adults.

Individual perceptions of health also play an important role in determining our feelings of happiness. In world surveys



from the 1980s to the present, self-assessed health status is the single most important factor is determining well-being. Here is where social capital plays a crucially important role.

Socially isolated people are more likely to smoke, drink alcohol, overeat, and engage in other unhealthy behaviors than individuals with strong social networks. In addition, social networks furnish assistance, such as transportation and convalescent visits, to their members. Finally, having strong social networks may have positive biochemical effects on the body that helps our immune systems fight diseases and the wear and tear of daily life. Studies in the US, Japan, and Scandinavia have demonstrated that socially disconnected people are between two and five times more likely to suffer from ill health than individuals with close connections to family, friends, and organizations.

In the US, even moving from a state with high social capital, such as North Dakota, to a state with low social capital, such as Mississippi, increases the chance of poor health between 40 to 70 percent. In fact, in one study, researchers concluded that relocating to a state with high social capital is the equivalent of quitting smoking. There is a strong correlation between public health and social capital. The more we are socially connected, the less likely we are to have colds, heart attacks, strokes, depression, cancer, and premature death, or to commit suicide.

Today, there is an epidemic of obesity in the US. About 35 percent of all adults are obese, and 65 percent of all adults are either overweight or obese. Based on this evidence, we might conclude that this problem is evidence of a lack of social connectedness among many adults. Could fraying social bonds be one of the causes of high levels of obesity?

Along with marriage, social connections, and health, religion and religious activities are strongly associated with social capital and happiness. On surveys, those who report that "God plays a very important role in their lives," in Helliwell and Putnam's words, "have higher reported measures of both life satisfaction and happiness." People involved with religious organizations are less likely to smoke and drink alcohol than those who are uninvolved. Religious people also tend to have longer life-spans and a more optimistic outlook on life than their non-religious cohorts.

Organizations where people worship together are one of the most important sources of social capital in America. Half of all memberships in the US are religious in character; more than half of all individual charitable contributions go to religious organizations; and more than half of all volunteering occurs through churches, synagogues, mosques, and other religious institutions. Membership in religious organizations is closely associated with other forms of civic involvement from volunteering to serving on juries.

Religious organizations are superb incubators of social capital. Members make friends, learn to run committees and give speeches, provide social services, visit the sick, and develop a host of civic skills. In any week, about 40 percent of Americans say that they have been involved in religious services and religious activities. Religious individuals also are more likely to contribute time and money, and to volunteer outside their own religious organizations than non-religious people.

There is a glaring exception to these religious generalizations, and that is evangelical and fundamentalist churches, such as Southern Baptists, Pentecostals, and the like. These are the fastest growing religious sects in the US, and are concentrated in the South and Southwest where social capital is the lowest in the country. Evangelical and fundamentalist social capital usually stays within the church, and church attendance is not positively correlated with community involvement. These denominations are less likely than other religious institutions to offer social programs and community outreach services, except right-to-life activities.

There are three other major factors that affect our social capital—age, education and intelligence, and gender. In surveys, respondents rate their well-being highest when they are young and when they are more than 65 years, if their physical health is good. Happiness and well-being are rated lowest by those in the 35-44 or 44-54 years age groups.

States with large numbers of poorly educated adults have lower levels of social capital than states with higher student test scores on standardized tests, higher high school graduation rates, and higher rates of attendance at post-secondary educational institutions. In general, increasing levels of education are associated with improved health and more income, but, aside from these factors, education seems to have little impact on happiness, at least in the US. Education has more of an impact in poorer countries on subjective well-being because it is more closely linked to income and occupational status.

Intelligence also seems to have very little relationship to happiness. While levels of education have risen dramatically in the US since World War II, there have been no overall increases in levels of subjective well-being.

Intelligence also seems to have very little relationship to happiness.

Finally, there is a relationship between gender, social capital, and a sense of well-being. In North America, Asia, and Scandinavia, life satisfaction is slightly higher among women than men. In Russia and the former Soviet Union, the opposite is the case even though there has been a decline in men's general health in these countries.

All over the world, women are more adept than men at making and keeping social connections. In the US, women make more long-distance calls than men, send three times as many greeting cards and gifts than men, and write more personal letters than men. Women spend more time visiting friends than men, and among young people, while men are more likely than women to play computer games, women are more likely than men to send emails.

Men join more organizations than women, but women spend more time participating in them. Women spend more time than men in

informal conversations and participate more in religious activities than men, which is the gateway to volunteering and philanthropy in America. Women are strong creators of social capital.

The evidence is overwhelming that there is a strong, positive relationship between social capital and feelings of happiness and well-being. When people are involved with families, friends, neighbors, and co-workers and actively involved in organizations and the civic life of their communities, they feel happier and more satisfied with their lives.

Social bonds are the most important predictors of life satisfaction. When people have supportive friendships and marriages, they are happier than people who are socially isolated. Robert E. Lane, the author of a comprehensive study of happiness in America, *The Loss of Happiness in Market Democracies* (2000), summarized this point well when he wrote that "most of the pleasures of life are not priced, are not for sale, and therefore do not pass through the market." Attending an organizational meeting on a regular basis is the equivalent of doubling your income when it comes to generating happiness. What are the implications of this fact for proposal professionals?

Money does not buy happiness, but living comfortably is conducive to a sense of well-being.

Happiness and Proposal Professionals: An Oxymoron?

If companionship and not income or commodities is the most important source of happiness and life satisfaction, then perhaps we need to re-examine the way we work and live. Below are my key recommendations for achieving a measure of happiness inside and outside work. They are based on the premise that we cannot achieve happiness if we pursue it directly, which is a reasonable conclusion to draw from the research. Instead, we are likely to be happiest if we increase our social capital.

Be Grateful and Adjust Expectations

Proposal professionals wear nice clothes and live in nice houses and apartments. They drive cars that usually start in the morning, and they have jobs that are meaningful to them and of value to their organizations. For all this we should be intensely grateful and appreciative.

The amount of commodities we have accumulated is not as great a predictor of happiness as is our attitude about them. If we constantly desire more, we always will be frustrated, disappointed, and unhappy. If you want to compare yourself to those around you, the best way to adjust your expectations is look at those below you and not at the people above.

According to the Internal Revenue Service, in 2005, real median household income in the US was $46,326. Men earned an average salary of $41,386, while women earned $31,858. The official poverty rate was 12.6 percent, and 37 million people lived in poverty, more than 13 million of whom are children. Even more are without health insurance. Proposal professionals should not ignore the fact that many of them are underpaid and overworked, but they are living or can expect to live solid middle-class lives, and for that they should be deeply thankful. Money does not buy happiness, but living comfortably is conducive to a sense of well-being.

Build Relationships

About 70 percent of our feelings of happiness are based on the quality of our social relationships with families, friends, neighbors, and co-workers. This is the single most important conclusion about the connection between social relationships and a sense of satisfaction and well-being. Among the elderly, few individuals regret not spending more time at work, but many lament not having been better parents, spouses, siblings, or friends.

The people who rate themselves the happiest believe in sharing, belonging, and giving of themselves to others. People who are actively involved in organizations and who volunteer and are philanthropic are far more likely to be healthier and happier than individuals who are socially isolated and unconnected to their communities. Be kind and generous inside and outside work, and you will increase your social capital.

Create a Work Environment that Promotes Well–being

Paid employment has a strong impact on the well-being of most adults. When employees are satisfied with their work conditions, job performance improves, absenteeism declines, company loyalty increases, and there is less uncooperative and destructive behavior on the job.

Well-being declines in the workplace when jobs combine very high demands with little opportunity for personal control and autonomy. This is the most common cause of job-related stress. At the same time, the anxiety associated with this kind of work environment inhibits employees from learning new skills and knowledge and being able to change their approach when confronted with new requirements.

There are numerous ways in which proposal professionals can create more well-being in their workplaces. I will mention just one. I am constantly appalled by the poor working conditions of many proposal professionals. Too many of them spend long days packed together around one long table working on their laptops, often in a room with bare walls and no windows. I am not sure which is more depressing, putting people into such a bleak, inhospitable work environment or accepting these work conditions as a fact of life. All of us need privacy—to think, to daydream, to call our children when they come home from school, or to dispute a credit card purchase that mysteriously turned up on our monthly bill.

Companies should strive to find comfortable accommodations for their proposal teams. Treating the proposal team decently means providing a work environment with at least a modicum of privacy. Anything less is an affront to ordinary human dignity. When organizations act kindly toward their proposal teams, they encourage the proposal team to act kindly toward each other. Strong social capital is based on reciprocity and a sense of fairness, which includes the provision of an adequate work environment.

Go with the "Flow"

The psychologist Mihaly Csikszentmihalyi has argued that the most enjoyable and affirmative activities are often those that most engage and absorb us. He called them flow experiences, which are a "state in which

10 Key Features of the work environment that are correlated with high levels of well–being:

- Opportunity for personal control and autonomy
- Opportunity to use skills and abilities
- Clear and realistic goals
- Variety in work tasks
- Job security
- Appropriate compensation
- Good working conditions
- Supportive supervision
- Good relationships with co-workers
- Being valued.

people are so involved in an activity that nothing else seems to matter; the experience itself is so enjoyable that people will do it even at a great cost, for the sheer sake of doing it." At their best, flow experiences provide individuals with a sense of discovery, creativity, and mastery over some field or topic.

Flow experiences are so enjoyable to us that we are willing to expend great time and energy on them. According to Csikszentmihalyi, flow experiences have eight characteristics in common. They: (1) can be completed by us; (2) demand our focus; (3) have specific goals; (4) furnish immediate feedback; (5) require deep involvement and concentration; (6) give us a sense of control over what we are doing; (7) energize us; and (8) are so absorbing that we lose track of time.

By their very nature, flow experiences cannot occur too frequently. If they did, we would be too exhausted and absorbed most of the time. But when they appear, we should embrace them.

In many ways, proposal development lends itself to flow experiences with its focused and intense work. Who among us has not been intensely gratified by working on an outstanding technical or management volume or bringing a year-long proposal development effort to a successful conclusion? By its very nature, proposal development is so demanding that often it requires work that absorbs time and energy and that requires our deepest involvement and effort. In our work environments, we need to engage in tasks that develop our sense of competence and participation.

In proposal development, personal well-being will be enhanced when individuals are able to pursue their own goals in ways that are valued by their peers and organizations.

In proposal development, personal well-being will be enhanced when individuals are able to pursue their own goals in ways that are valued by their peers and organizations. What makes work stimulating is working toward a satisfying goal, not simply attaining it.

Make Peace, Not War

The states with the highest social capital in the US have the lowest rates of crime, violence, and delinquency. In one survey, respondents were asked if they would "do better than average in a fist fight." Nearly half of residents in Louisiana, West Virginia, and New Mexico—states with some of the lowest social capital in the country—agreed with that statement compared to less than a third of the residents of South Dakota, Maine, Iowa, Minnesota, New Hampshire, and Nebraska, which are among the states with the highest social capital. Wherever social capital is high, so are mutual trust, cooperation, and altruism. As a result, there is less violence and crime.

If you want to sustain strong social bonds at work and within your community, be cooperative, collaborative, and promote reconciliation. This will increase your sense of well-being along with those around you. You may achieve your goals by being adversarial and highly competitive, but only at the cost of poor social relations, which decreases everyone's happiness, including your own.

Stay Healthy

There are many aspects of our health that we cannot control, but personal behavior accounts for about 70 percent of it. There are obvious ways we can all improve our health. First, build your social capital. People with strong social connections are healthier than socially isolated individuals.

Second, eating properly and exercising regularly fosters happiness by increasing our energy, our sense of satisfaction, and our opportunities for enjoyment. As Dr. George Sheehan, the guru of running, once said, "Fitness has to be fun. If it is not play, there will be no fitness. Play, you see, is the process. Fitness is merely the product." He concluded that running would not add years to your life but life to your years. Adults need to engage in playful, energetic activities to keep healthy.

Companies and proposal managers can take concrete steps to encourage good health among their proposal teams. The most basic step would be to lock the proposal room for one hour in the middle of the day and strongly encourage everyone to leave the building for a brisk walk, regardless of the season. Too many proposal professionals spend their days and evenings inertly occupying a chair in front of a computer munching on unhealthy foods and consuming too much caffeine and sugar.

If you are a proposal manager, set a good example by providing your team with a map of the walking paths around the office and taking frequent walks yourself.

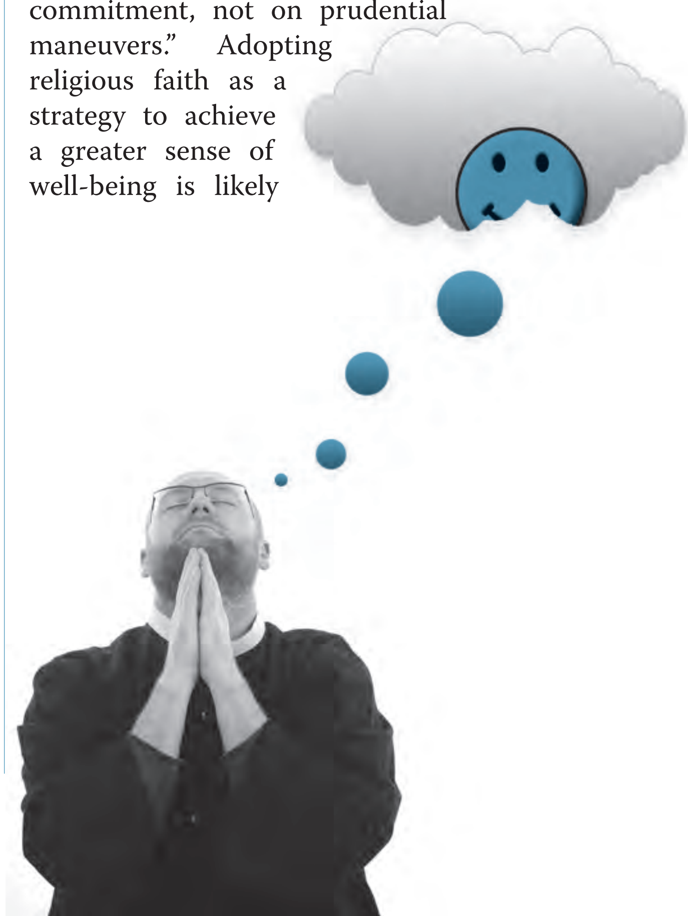
Too many proposal professionals spend their days and evenings inertly occupying a chair in front of a computer munching on unhealthy foods and consuming too much caffeine and sugar.

Have Faith

People with strong spiritual beliefs are happier than those who lack them. Being active in religious institutions often improves health and lengthens life spans. Despite the fire and brimstone and sermons about guilt and sin that pour forth from many religious institutions, religious people are more optimistic than their nonreligious neighbors.

Religious institutions help congregants make friends, provide opportunities to learn important social and leadership skills, provide a support network when illness and tragedy strike, and encourage volunteerism and generosity. The exceptions to these religious generalizations are evangelical and fundamentalist churches, which do not foster civic engagement.

Nonbelievers, however, should not join religious institutions just to become happier. In the words of one scholar, "true religious belief is founded on a spiritual commitment, not on prudential maneuvers." Adopting religious faith as a strategy to achieve a greater sense of well-being is likely



to fail. Happiness is probably a by-product of religious participation, not a cause, because it is social in nature.

Support Organizations and Public Policies that Increase Social Capital and Happiness

The research on social capital and happiness has profound implications for public policy. Income is not the most direct source of happiness. Instead, in the words of Lane, "we get happiness primarily from people; it is their affection or dislike, their good or bad opinions of us, their acceptance or rejection that most influence our moods." Consequently, we need to "move from an emphasis on money and economic growth toward an emphasis on companionship." As he points out, "in rich societies, for people above the poverty line, more money as compared with friendship and community esteem, a loving spouse and affectionate children, quickly loses its power to make people happy."

Most Americans say that they dislike politics because of its competitiveness, abrasiveness, and feeling that voting and participating in political contests do not make much of a difference.

This is a heretical idea because we consider such concepts as "happiness" and "well-being" to be "externalities" in the impoverished vocabulary of most contemporary economists and politics. We need an economic and public policy that focuses more directly on building social capital and creating the conditions for happiness. However, changing public policy will be difficult because democratic politics usually do not contribute to people's subjective well-being. Most Americans say that they dislike politics because of its competitiveness, abrasiveness, and the feeling that voting and participating in political contests do not make much of a difference.

Nevertheless, I recommend that we find ways to improve on the following in the realm of public policy:

- Monitor levels of happiness at least as thoroughly as we do economics and income

- Reduce levels of poverty because poor people usually have the highest levels of unhappiness
- Reduce unemployment because not working deprives people of their self-esteem and cuts them off from their social networks at work
- Keep inflation low because high rates of inflation increase the costs of daily transactions and induce uncertainty about the future, both of which lead to unhappiness
- Promote family-friendly policies at work and in our communities because good family relations are a major source of happiness for spouses and children
- Expand public spaces from sidewalks to community centers to parks because they are sites where social capital is built
- Address global climate change because it will seriously affect everyone's happiness
- Support activities that increase volunteerism, philanthropy, public service, and civic involvement because they are major sources of social capital.

Stumbling Toward Well-Being

Right before he died in 1832, the philosopher of utilitarianism Jeremy Bentham wrote a touching birthday message to a young girl. "Create all the happiness you are able to create: remove all the misery you are able to remove. Every day will allow you to add something to the pleasure of others, or to diminish something of their pains. And for every grain of enjoyment you sow in the bosom of another, you shall find a harvest in your own bosom; while every sorrow which you pluck out from thoughts and feelings of a fellow creature shall be replaced by beautiful peace and joy in the sanctuary of your soul."

This is eloquent and sage advice. Our happiness is directly related to the social connections we create around us. Happiness comes from two places—from within and from our families, friends, neighbors, co-workers, and from engagement in our communities. If we build social capital where we live and work, then we are likely to be happy.

Create all the happiness you are able to create: remove all the misery you are able to remove. Every day will allow you to add something to the pleasure of others, or to diminish something of their pains. And for every grain of enjoyment you sow in the bosom of another, you shall find a harvest in your own bosom; while every sorrow which you pluck out from thoughts and feelings of a fellow creature shall be replaced by beautiful peace and joy in the sanctuary of your soul.

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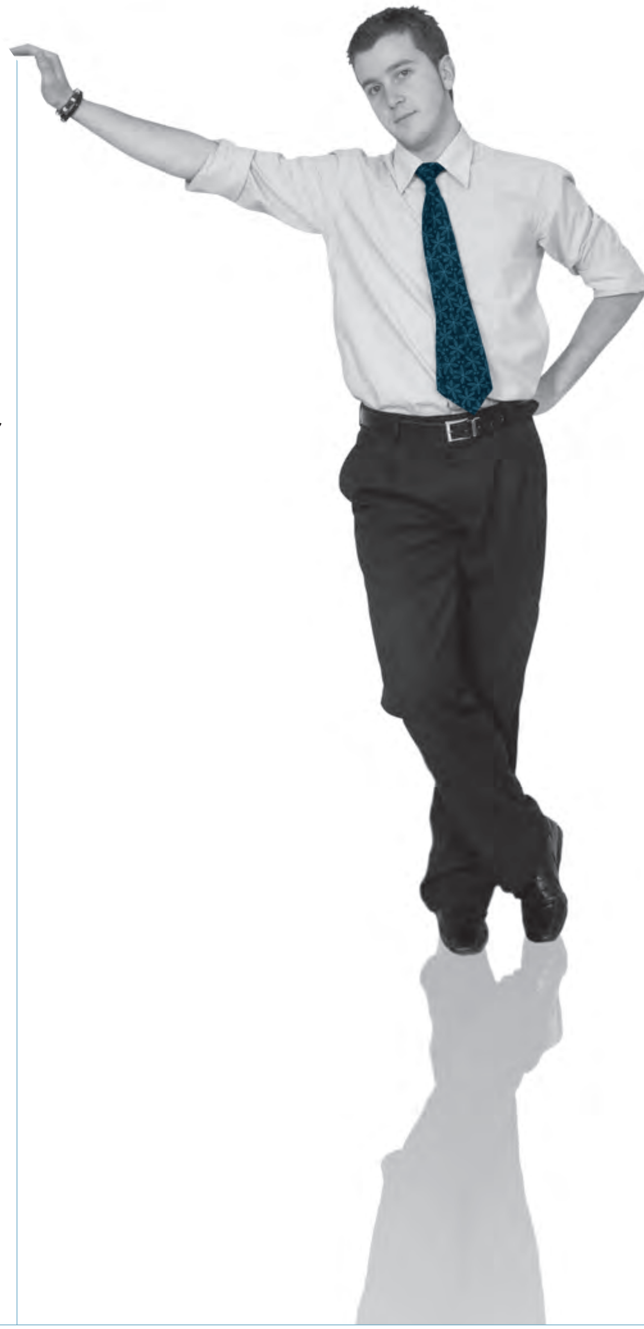

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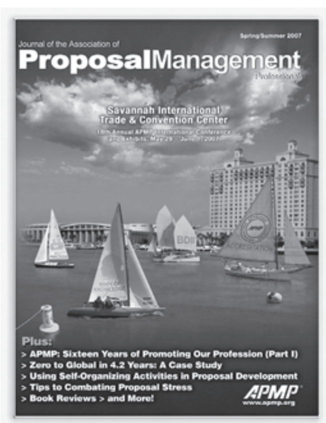

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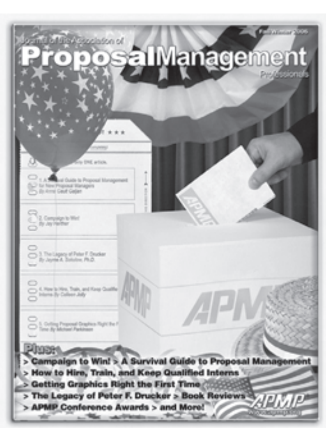

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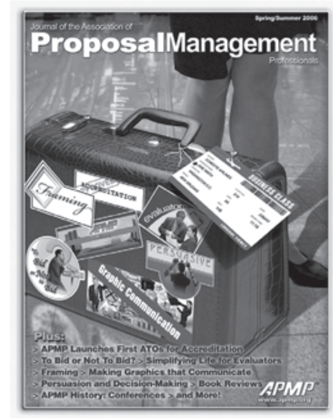

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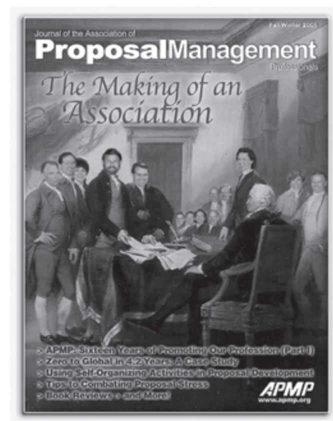

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