Welcome

John Elder, AF.APMP

It was 20 years ago, on August 14, 1989, that the Association of Proposal Management Professionals (APMP®)was founded. This year we commemorate this important milestone—two decades of promoting our mission to "advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits." There have been many milestones over the years—the first conference, the first *Perspective*, the first *Journal*, the initiation of the Accreditation program are but a few. Now we celebrate the past 20 years, and look forward to what the next 20 will bring. I hope you have made plans to attend the Annual Conference in Phoenix, AZ from 9-12 June, and join in the celebration!

The conference returns to the Sheraton Wild Horse Pass Spa and Resort; those who attended the conference there in 2005 will remember the relaxing and stressfree environment it invoked. In this issue, Colleen Jolly describes how to achieve that stressfree environment at home through yoga. As she says, "As proposal professionals, we spend a lot of stressful time hunched over our computers, trapped in small (often windowless) rooms, and in dire need of an escape. What we need is some yoga"!

Want to know how to incorporate a "scum" or a "chunk" into your processes? Wendy Frieman bases her article on how agile methods and tools, used in software development, can help proposal professionals accomplish such goals as continually attending to end users and self-organizing teamwork.

Christopher Kaelin provides the results of "The Big Proposal Management Survey 2009," a global online survey project co-sponsored by APMP and CSK Management. The survey covered topics such as proposal process, resources, culture and work environment, trends, tools, and education, and it offers some interesting results. Charlie Divine and Vicki Griesinger also provide the highlights of another study. Sponsored by the BD-Institute and BAE Systems E&IS OG, the research study focused on world-class proposal writing capabilities.

Speaking of proposal writing, Katie Gaines offers six rules of effectively structuring proposal documents. As Editorial Director for Writing Machine, a UK-based company, she proves that the fundamentals of proposal writing know no boundries.

Finally, this is my last issue as Managing Editor. I would like to thank everyone who served on the the *Journal* staff during my tenure, especially the most recent staff members: Jayme Sokolow, Linda Mitchell, Rick Rider, Betsy Blakney, Colleen Jolly, and Ali Paskun. I would also like to thank David Winton for his support over the past five years. These individuals, along with all the authors, book reviewers, and Editorial Advisory Board members, have willingly volunteered their time and talent to provide you with a quality professional journal you can be proud of. It has been a pleasure managing the *Journal*, and I will be seeing you around at future APMP events.

Table of **Contents**

Layout Design by Lakin Jones, 24 Hour Company. Cover Art by Steve Cummings, 24 Hour Company.

Articles

Regulars

General Information

CEO **Forum**

David Bol, AF.APMP

It is ironic that as we approach the Association of Proposal Management Professionals (APMP®) annual conference we are looking back over the past 20 years. Our theme, "Knowledge is Power," is based on the premise that as we have gained proposal management knowledge, we are in a better position to win proposals. We have tracked economic trends, global business tool and process development, advanced our sciences through training, and have applied these applications to the changing worldwide business environment. Our presenters at the conference come from all points across our globe and will share with us how this change has affected the way we do business and proposals.

In changing our view point and looking forward into the next 20 years, it is a certainty that we will experience the same degree of change. Technology and perhaps global boundaries will surely change beyond our comprehension in that timeframe, so guessing where we will be in 20 years is impossible. However, we can narrow our view, look at the past few years, and make some educated guesses about the coming year and beyond.

With uncertainty in the world marketplaces and with the new governments in place, what is the future of business development? Will the same tools and techniques that we use today still be successful? What trends will continue and what trends will waste our precious Business Development monies? What global market will rise, and how will we respond to their needs? Let us take a look into my crystal ball.

Like a lot of you, I am bombarded on a daily basis by an overwhelming amount of media. I get way too many emails, I am on too many lists for magazines and journals that send me continual updates, I watch the news as I workout, and I get information from a few sources that have proven reliable over the years. I get this information from around the world. So with that said, these are simply my predictions as I gaze into the crystal ball.

Strategic planning has become critical. Gone are the days where there was ample business to keep our companies afloat. It is critical that we analyze our market and plan for the future. The earlier we begin planning, the quicker we will develop a business path to follow. Additionally, we must look outside our boundaries and consider global markets.

The future cannot just be 6-months-to-year-plan, but must include a 3-year perspective, a 5-year perspective, and, if possible, a 10-year perspective. We must be honest with our capabilities, our resources, our staffing—and apply them appropriately. With limited opportunities, a no bid decision on a poorly researched opportunity should be the correct strategy. This improves our chances of winning another bid we are positioned well for.

At the 2008 APMP conference, the theme was "Global Positioning Strategies for Capture and Proposal Professionals." We challenged all who attended to think beyond their borders and position their firms to do business on a global perspective. As our world economies shift, this must be considered in our strategic planning.

We must take capture planning to the next level. We have seen significant trends in capture planning in recent years and rightly so. If we have not positioned our company to win the opportunity, chances are we will not. The explosion of the content on the Internet makes some aspects of capture planning dramatically more effective

Four areas are absolutely essential in capture planning—the four Cs;

- Customer needs (beyond the scope of work)
- Competitive landscape
- Core competencies (our internal assessment)
- Cost to win.

If any of these pieces are missing in our capture plan, go get them! We must do everything in our power to capture the business. A shortcut here is disastrous!

We will need to understand foreign currencies. The dollar is unstable, the Euro

> *"Graphics are now the norm. If we are not seeing 40 percent of our document in graphic format, we are behind the times."*

is gaining ground, and other currencies must be considered when doing business in that country. For example, as the banking industry adjusts to the crises in the US and the impact that it has worldwide, all countries must look to options if funding is an issue. We must also support global subcontractors and their capabilities. Often it is a requirement that we have a physical presence in the country where we anticipate doing business. For some, that will equate to global expansion. This must be considered in our capture plan.

A good capture plan is part of this foundation of success. We build upon it, we modify it, and ultimately it is migrated into our proposal plan. Start early, be honest with your own capabilities and the competition, and think beyond the normal boundaries.

Relationships are key! Think about how we buy. We almost always buy from friends or from someone we trust. Even a large item—a car, an entertainment center—if the sales person is not our friend or if they have not earned our trust, statistics overwhelmingly suggest we will walk away from the sales engagement.

It is no different in the federal or international procurement world. If we do not know the players, the chances of winning are slim. If we have built a relationship with the customer, our chances improve. If we have done good work for this customer and we have continually nurtured the relationship, the chances of us winning new or additional business improves dramatically. If we drive the relationship to a level-five maturity against the Business Development Capability Model, the synergy between the two entities suggests that our entire business development team is customer focused, optimizing the chances for continuous improvement and continuous success.

This becomes even more critical with foreign work. A local presence who understands the language, the customs, and the culture is now mandatory for international business.

Conversely, if these relationships and people are not in place, if we are responding to RFPs or Task Orders simply because they have appeared on the radar, we are in grave danger of wasting valuable bid and proposal monies and time on a difficult, uphill struggle. Take time to build the relationship, nurture the customer, and grow successful together.

We must continually refine our proposal process. Our APMP organization is celebrating its 20th anniversary this year. I have been a part of the organization for most of those years. Proposals have come a long way, and we must continue to adapt. Total electronic submissions are becoming standard. We must be 100 percent confident that the files we send are secure, and will open exactly as we sent them. Timeframes continue to be unrealistically short, but we are all in the same boat. Let us adapt and have the upfront work done. All storyboards and drafts should be done prior to the release not after. Graphics are now the norm. If we are not seeing 40 percent of our document in graphic format, we are behind the times. Look at our world around us—it is visual. We learn more visually, and our documents must reflect this.

"Change is upon us, and we must grow to meet the new needs for our customers and succeed in this ever-changing business environment."

Let us shift gears for the remainder of this article. We have looked at ways that I feel our companies and we individually must adapt. But why? In my opinion, as I indicated earlier, our future Business Development environment demands its.

Our nations are at war! Over the past several years, our nations have spent billions in fighting wars. Defense contractors have been and continually will be awarded contracts to support these efforts. For some companies, this is their lifeblood, and it must continue for them to thrive. The trend though is to cease fighting.

Does this mean that this military spending goes away? Yes and no. I believe that to some degree the money we are spending generated by combat will be decreasing. However, I see significant trends that suggest the money we will spend on deterrence will increase.

We must protect our lands, people, and infrastructure at all cost. We cannot allow any nation or any terrorist to compromise our military, financial markets, or infrastructure. This is where the war will continue, and money will be spent to secure this freedom. If we are a contractor to the military, I believe our strategy must include looking at ways to support our homelands.

Whether it is fighting terrorists on our own soil or supporting our allies against some foreign country, proposals continue to support the contractors who supply war efforts. As these efforts wind down, our best predictions suggest that this money will be allocated in our native lands. Are we prepared for this? Do we know the companies that will stand to gain from this, and how can we support their needs.

The Stimulus Package. This is a new concept, but one that is becoming very real. The US Government like many other countries is pumping large sums of money into the world economy. A question being posed in many US boardrooms is, "How much of the nearly $800 billion stimulus package will end up funding federal contracts?" No one is sure yet, but some predict from $50 to 100 billion. Additionally, it is predicted that this money will also indirectly support the foreign companies who are affected.

These contracts, in most cases, will need to be competed. Is your firm aligned and positioned to do business with the companies that will spend their money for these efforts? If not, you must begin now to plan for these expenditures because all indicators are that money will have a ripple effect felt worldwide

Information Technology and Information Assurance (IT and IA) are poised to grow significantly. They support government, commercial, secret, open, financial, and economic global markets. As we move towards common platforms that support huge bandwidths of streaming information, our infrastructure must grow significantly to support this. It is incredible—the knowledge available today in video format to our handhelds was not even a dream 20 years ago!

The first 100 days always defines a new presidency. This timeframe has passed for President Obama, and, like his previous successors, his tenure has ushered in a significant amount of change in that time. It has defined him and the course of action that he believes will best promote US growth and his economic relationship with every foreign country in the world.

I challenge you to have a 100-day benchmark after the Annual Conference. Consider the conference the starting point where you take over the control of your proposal world and begin to implement changes that define your new term. What can you apply that you have learned from one of the presenters? What knowledge can you apply that will leverage your company and your skills above your competition?

Is my crystal ball totally clear—absolutely not. It does tell me though that if we continue to do the things that we know are critical for success, we will be successful. Times are difficult, but we must not panic. Business will continue to be procured, and we must continue to position ourselves and our companies favorably to win it.

Knowledge, I believe, now is more important than ever. Our immediate reaction might be to go after any and all business so that we can generate immediate revenue to keep us in business. Our best practices models suggest this is not the most productive way to obtain business. Knowledge from planning, capture, and evolving our proposal processes will keep us on course through this temporary crisis.

Plan where to spend your resources. Develop the capture plans that are critical for success. Stay in tune with the proposal industry through organizations such as the APMP. Learn from your peers. Finally, begin to think a little outside the box. Change is upon us, and we must grow to meet the new needs of our customers and succeed in this ever-changing business environment.

APMP Mission and Code of Ethics

Mission

- Our mission is to "Advance the arts, sciences, and technologies of new business acquisition and to promote the professionalism of those engaged in those pursuits."
- The core of our mission and our organization is proposal related. The broader mission of APMP includes the entire new business acquisition cycle, while maintaining proposals as the cycle core. New business acquisition encompasses marketing, business development, and acquisition activities from early marketing positioning through negotiations and award. APMP recognizes that, as proposal professionals, all members are dedicated primarily to the successful execution of one or more of the diverse activities involved with proposal execution.
- We further recognize that including new business acquisition as a part of our mission provides an opportunity to expand knowledge and capability for our members, providing them with information regarding the entire business acquisition cycle.

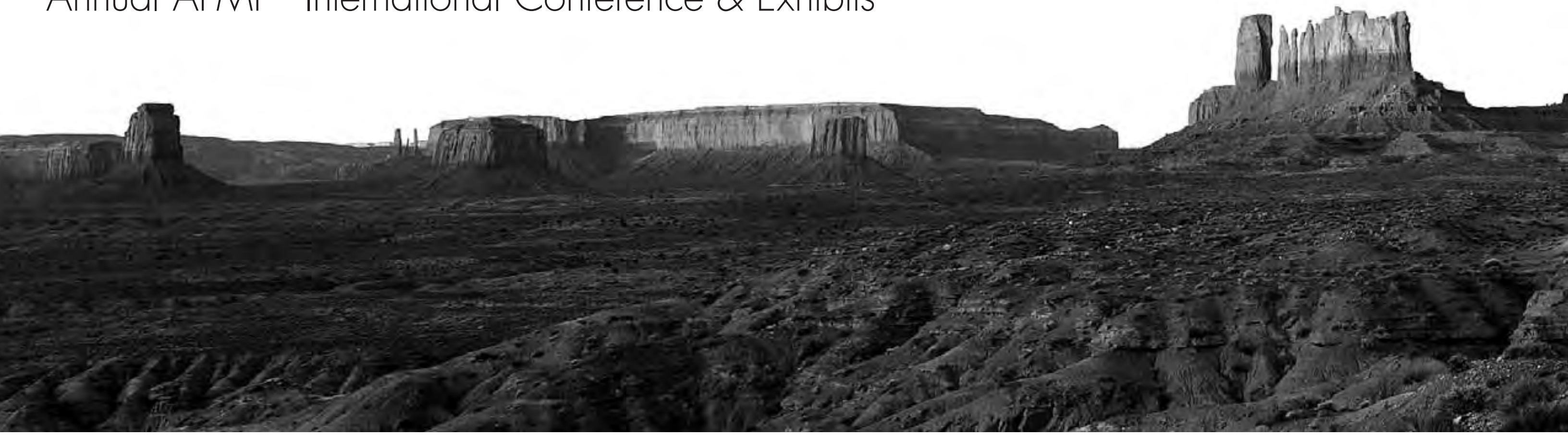
Code of Ethics

Members of the APMP are expected to:

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

20th Anniversary

Annual APMP® International Conference & Exhibits



At the Sheraton Wild Horse Pass Spa and Resort in Chandler, AZ

June 9 through 12, 2009

At the 2009 Annual APMP® International Conference & Exhibits, we will look back on the past 20 years and the knowledge we have gained and applied in our industry, and will continue to apply into the future. Join us in 2009 for a memorable event celebrating APMP's 20th Anniversary.

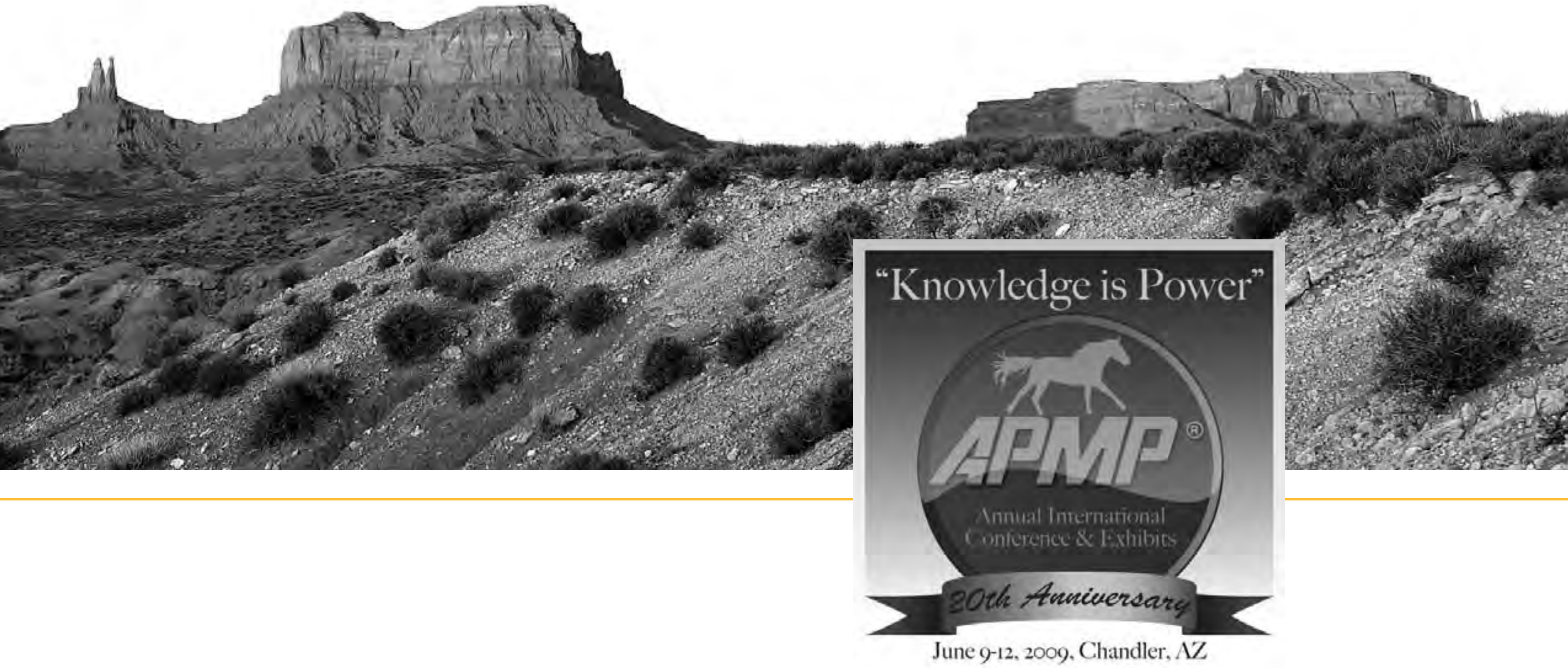
Knowledge is Power

By using the term Knowledge, we have an opportunity to focus on the work APMP has done over the years and the Knowledge Base that we are growing today through the Body of Knowledge and Accreditation.

APMP has a 20-year history of advancing the "arts and sciences of proposal management." We have recognized that the original mission needed expansion because of the knowledge that our members were seeking. This modification to the original mission expanded our audience to include those who are involved with capture planning and the front end of the business. In addition, we have embraced the challenges of globalization of our membership. So Knowledge IS Power when we look back on the changes in our profession, from people to processes to technologies.

Keynote Speaker

Mentoring and coaching are key to success and growth in our industry. This year, we welcome Dr. Terry Bacon, President and CEO of Lore International, who is an internationally recognized coach and leader. He just recently received an award for one of the "Top 100 Best Minds on Leadership" by Leadership Excellence, a major publisher on leadership development. Dr. Bacon has consulted with and coached hundreds of executives—from mid-level managers and professionals to board members, CEOs, and other members of the C-suite. He has assessed executive teams, designed and led executive team building initiatives, and helped senior teams improve their effectiveness. He is the author or coauthor of a number of assessments, including the Survey of Influence Effectiveness, Coaching Effectiveness Survey, Lore Leadership Assessment, Observation of Type Preference, Sales Effectiveness Survey, and, most recently, the Leadership Balance Sheet™.



The Location

For our conference this year, we return to Phoenix, AZ, home of APMP's first chartered chapter, Valley of the Sun, and the site of our 2005 Annual Conference & Exhibits—Sheraton Wild Horse Pass Resort and Spa.

This setting is appropriate for reflecting on our history and our future. There is much we can learn from the Native American traditions and the Wild Horse Pass surroundings that demonstrate the knowledge these two tribes have molded together, as examples of the power that teamwork and a shared vision can have on a people.

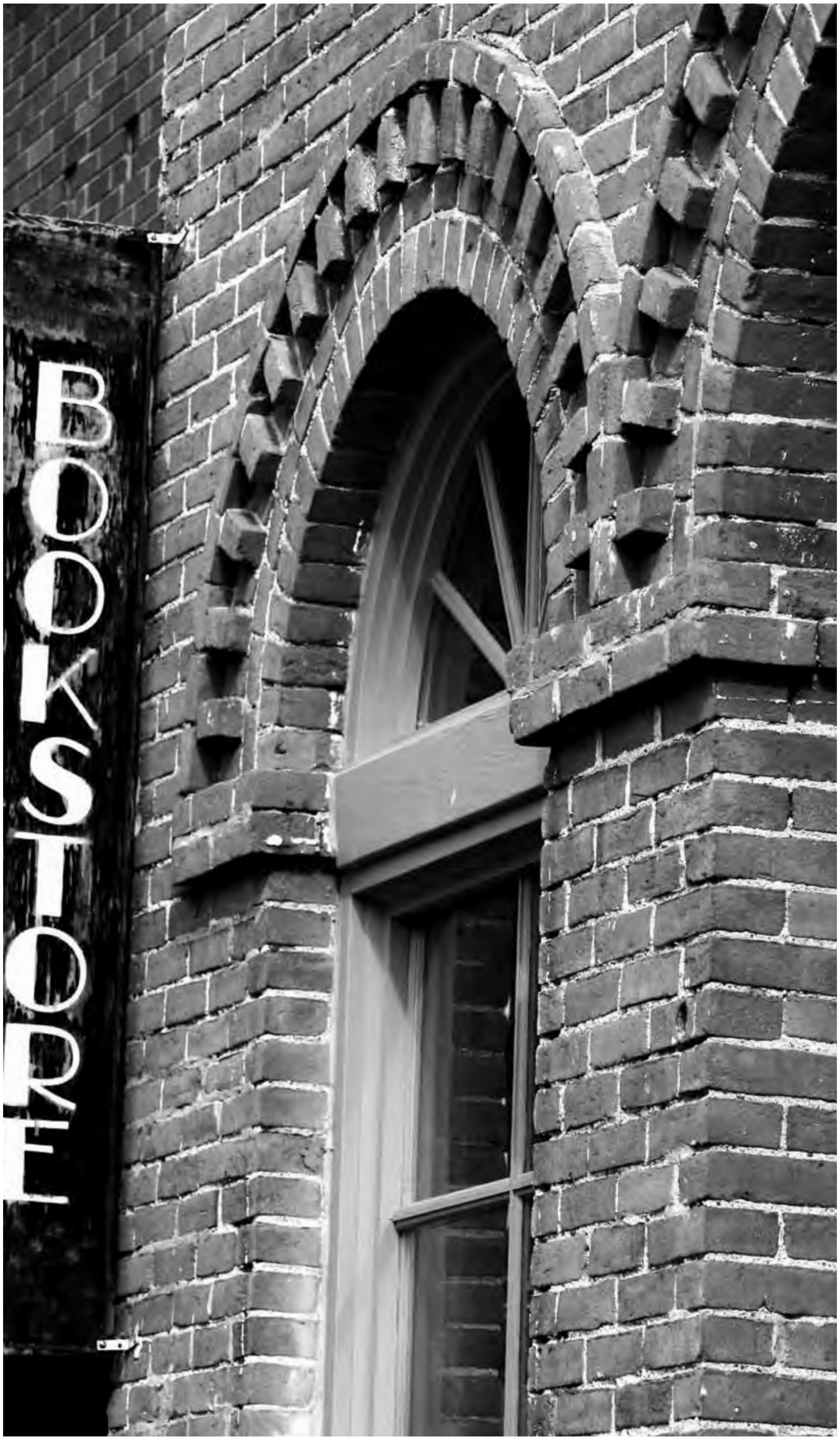
Presentations

We are looking for case studies, lessons learned, panel discussions, and tips and techniques that proposal professionals of all types can take home and apply in their workplace. We are seeking presentations across the full spectrum of business development from market development and business strategy, to capture development and strategy, through proposal development and strategy, and professional development.

Some of the topics include:

- Market Assessment
- Opportunity Qualification
- Strategic Planning
- Teaming and Subcontracting
- Capture Planning
- Proposal Tools and Techniques
- Knowledge Management
- Proposal Production
- Reviews
- Pricing
- Oral Presentations
- Lessons Learned
- Decision Making
- Team Building
- Mentoring and Coaching.

Searching for a book?



We got it.

Book Store

June 9 – 12 at the

20th Anniversary
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Conference & Exhibits

Come explore a variety of proposal, graphical, and management literature to create or improve upon existing processes.

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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.

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 Suzanne Kelman at (714) 392-8246 to make arrangements for payment.

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Members of APMP can update their profile online by clicking "Membership" on the APMP Web page, and then clicking "Update Member Profile." Updating a profile requires the username and password you were provided when you became a member.

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)

All Other Placement Locations*

- Full Page: $2,200.00 (4 Color)
- 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 2010 will be published in the Fall/Winter 2009 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).

To Secure Advertising Space:

Please contact John Elder at (703) 841-7809 or email jelder@caci.com.

Advertising Format and Guidelines:

Submit all artwork electronically as CMYK or Grayscale 300 dpi TIFF or PDF, with 1/8th inch bleeds (if applicable) and crop marks to colleen@24hrco.com.

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,
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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.

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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 due	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:

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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The Six Golden Rules of proposal writing

by Katie Gaines

About to start work on your next proposal? Do not even think about putting cursor to screen until you have read the six golden rules of proposal writing from Writing Machine's Editorial Director, Katie Gaines.

1. Establish your competitive edge

Research by Yale in the US shows that decision-makers will only give written documents an average of seven minutes of reading time – no matter how important the document might be.

For this reason, competitive differentiation is absolutely fundamental for proposal documents – especially in the executive summary. It's critical you make use of that limited time to communicate your competitive edge clearly to your prospect.

Tips for communicating your competitive edge

- **Think like your prospect.** Ask yourself – what is my prospect looking for in this bid? What are they asking me for overall, and within each question? You must ensure you understand fully what the prospect wants.
- **'Spin' your proposition.** Don't be afraid of the word 'spin'. All it means is to take your proposition, and position it in the most interesting and relevant way for your prospect. Take the hard work out of the decision-making, and remember: you've only got seven minutes to make them choose you.
- **Make sure you can articulate your competitive edge in a sentence.** If you can't write a single sentence explaining why you should be chosen over your competition, then you're probably not ready to write yet.

2. Structure your document properly

Structure is all about control.

It enables you to decide the order in which you want the reader to read your words. It enables you to affect the reader in the right way. And it enables you to guide the reader on what to do next.

All of these goals are invaluable to any bid. All of them can be attained with an effective structure.

How to structure effectively

1: Think about your objective. The first step to structuring effectively is to know your headline message for the bid or bid section that you're writing. This should be written at the top of the page, to guide you at all times – and prevent you from going off track when structuring.

2: Get your thoughts on the page. The next step is simply to get your thoughts on the page, using your message to guide you on content. Just note the points down, and worry about the order later.

Indeed, one of the most common mistakes people make is believing they need to structure a document in order – from the beginning through to the end. This leads to a real fear of the blank screen.

On the contrary—you don't need to start at the beginning when structuring. If you know your main message, you can start anywhere. Just think to yourself—what points do I need to make to support my message?

3: Consider the order—and relevance. Only once you've listed as much content as possible you should think about the final order and relevance of your content. What needs to come first? Do I really need a section on my company's commitment to saving pandas? Really think about leading the prospect through your content, and try to anticipate what they'll want to find where – and what won't be of any interest to them at all.

> **"You don't need to start at the beginning when structuring, or when writing. If you know your message, you can start anywhere."**

Remember: you're still structuring, not writing, so don't be tempted to write anything yet.

Of course, your structure is a fluid being. It's not set in stone. You can add new and relevant bits as they come to light.

4: Start drafting. Got your structure more or less sorted? Honestly? Then you're ready to start drafting your text.

3. Make your document navigable

Navigability is vital within proposals as a whole, and within each response. It ensures readers can find the information they want straight away, and makes it easier to divide the document among colleagues for assessment.

Once you've finished drafting—**and only once you've finished drafting**—make good use of navigational devices, such as simple headings, bullets, boxes and bold text. Readers are lazy, and they need as much help as they can get to ensure they travel through your document from start to finish. When you've got your final draft, go through your document and check for/add these where you feel it's appropriate.

4. Keep everything clear

One of the most important things about writing is that you've got to remember the people you're writing for won't necessarily have much time to read your writing, and therefore you must make the effort to keep your writing concise and ensure that it doesn't go on and on because people simply won't read it.

Phew.

Clarity is the key to communication. Communicate your competitive difference clearly, and you help give your business the best chance of winning a proposal.

Keep things short

Don't be afraid to use shorter sentences and shorter words. A good rule of thumb is to use words with no more than three syllables, as these are easier to read. And aim for about 20 words per sentence, to ensure the whole text is easy to digest.

Use active tense, not passive

A verb is said to be in the 'active voice' when somebody or something in a sentence is actively doing something to somebody or something else. A verb is said to be in the 'passive voice' when the somebody or something has something done to them.

If you want to liven up your copy, it's worth avoiding passive constructions. Use of an active construction gives your text a much more powerful sense of immediacy, whilst also avoiding ambiguity.

For example: (*active* in *italics*, passive construction underlined)

- The little boy was approached by the little girl and was then struck hard in the face.
- The little girl *went up to* the little boy and *hit him* in the face. Hard.

5. Answer the question

Not answering the question is possibly the most dangerous mistake any bid writer can make. And to be fair, it's easily done. You're pushed for time… and you seem to remember writing something about customer service/reporting requirements/transition and transformation in a bid you put together a couple of weeks ago. So you open it up, scan read it, and paste it in. Job done.

Except that – unless you are extremely lucky – the job is far from done. More often than not, you actually end up with something that answers only *half* of the question. Or something that spirals around the question in a never-ending vortex of verbosity.

It sounds obvious, but it's surprising how often people forget a simple 'yes' or 'no'. Put yourself on the receiving end of this question and its answer:

Q. Can your organisation providesupport to all of our 130 global locations?

A. We believe in providing global services to all our customers. We operate in 250 locations around the world and offer helpdesk services for 180 of these. We also have a bank of 270 engineers to call upon. You can find a map of our locations in Appendix 16.4.

Right, so does that mean you can provide support for all of our locations or not? Perhaps the following would have been clearer—and less frustrating...

A. Yes. We operate in all the countries that [CUSTOMER] operates in, and offer telephone helpdesk services in each of them. We can also offer access to our own mobile engineers in 120 of your locations and third party engineers in the remaining ten.

So the point is – take your time. Even if you seem not to have any. Read the question thoroughly, make a written note of the key points that your answer should cover, and ensure you cover them.

The alternative is spending your time writing a bid that will simply end up in the bin.

6. Proofread!

Everyone makes mistakes. But the fact is that just one silly typo or spelling error can undo a lot of hard work in your proposal. This makes proofreading fundamentally important.

Read out loud... and really listen

Odd though it may sound, people often concentrate too much on the process of writing, when they should be paying at least as much attention to the process of listening.

The best way to proofread your writing is to print it and read it aloud. The ear is much less forgiving than the eye, and you'll find yourself tripping up on phrases that your eyes would ignore on their own. This allows you to improve the style, wheedling out ungainly constructions and repetitions, and generally adding sparkle.

[redacted]

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About the Author:

Katie Gaines joined the Writing Machine in 2003 as a junior writer; today she leads the writing team. As Editorial Director, Katie co-developed Writing Machine's range of editorial services for bid teams. She has also performed the role of messaging consultant, editor, and writer on a variety of proposals at client premises and from Writing Machine's offices in Winchester, UK.

Prior to joining Writing Machine, Katie worked in Corporate Communications for The Learning and Skills Council.

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Yoga for Proposal Professionals: A Guide and Case Study

by Colleen Jolly, AM.APMP

“Yoga really is for everyone.

Regardless of age, fitness level, or religious conviction, everyone can benefit from and easily enjoy yoga.”

Yoga, for many people around the world, is a way of life. It is a system of breathing, physical movements, and meditation that for thousands of years have helped people keep their bodies and minds in tune and alleviate physical and mental ailments, including high blood pressure, stress, and anxiety. As proposal professionals we spend a lot of stressful time hunched over our computers, trapped in small (often windowless) rooms, and in dire need of an escape. What we need is some yoga!

A Brief History of Yoga

Yoga originated as a spiritual practice in what is now India during the Bronze Age (approximately in 3000-3500 BCE). In Sanskrit, the word “yoga” roughly means “to yoke” or “uniting” as in union of mind, body, and spirit, and was practiced as a method of gaining enlightenment. Yoga is prominently mentioned in well-known Hindu spiritual texts like the Upanishads, part of Hindu scriptures, and the Bhagavad-Gita, literally “Song of God/the Lord,” another sacred Hindu text. Yoga continues to contribute to many schools of thought within Hinduism and is also connected with other religious traditions, including Zen Buddhism and Tibetan Buddhism, as well as Tantric practices. Yoga can be seen as a system or lifestyle through which its practitioners gain greater/better health, mental control, and ultimately self-realization.

For more information on yoga’s historical, religious, and spiritual impacts, read Mircea Eliade’s 1954 book *Yoga: Immortality and Freedom.*

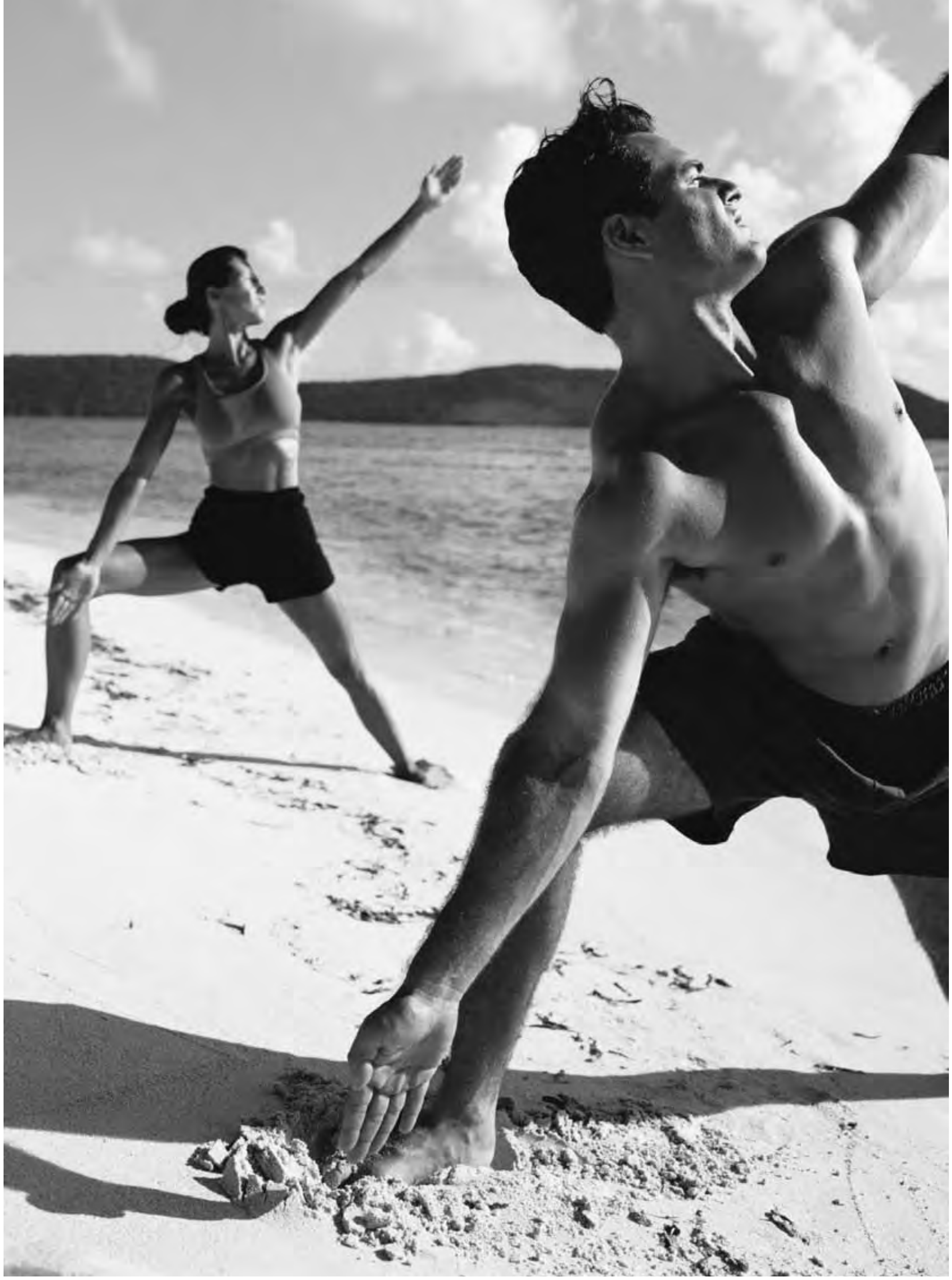
Why Yoga?

Yoga really is for everyone. Regardless of age, fitness level, or religious convictions, everyone can benefit from and easily enjoy yoga. According to *The Complete Guide to Pilates, Yoga, Meditation and Stress Relief*, one of many books and studies describing the therapeutic effects of yoga, there have been numerous “scientific studies [that] have shown that regular practice of yoga decreases problems with breathing, digestion, and blood pressure, eliminates stress and tension, and helps people suffering with arthritis and arteriosclerosis.”

Yoga is intensely personal. For those of us who are competitive, it brings that competitiveness firmly inside where we measure our ability to do a certain pose or *asana* against our own body rather than that of another. There is no perfect way to “do” any aspect of yoga or accomplish any particular pose, rather yoga recognizes that we are all slightly different and must find our own limits and create our own “perfect” experience.

Yoga integrates five main principles that reflect the concept of universal “oneness.” When practicing yoga in a modern setting, choose the level(s) of each principle (or even just a few of the five principles) that make sense for your lifestyle. Like most new endeavors, change will not happen overnight. But once you commit to a plan, stick with it; you will see positive results.

1. Relaxation—many people who practice yoga (commonly referred to as “yogis”) do so to help calm the mind and relax the body.
2. Exercise—the most common aspect of yoga, as practiced in the West, focuses on the asanas or poses that stretch and tone muscles.
3. Breath Control—breathing correctly helps increase lung capacity, improve physical ability, and can act as a relaxant.
4. Diet—eating a well-balanced diet at regular intervals during the day will improve overall health.
5. Meditation—there are many ways to meditate, which may help bring you greater self-awareness or help you just enjoy being present and not worried about things you did or things you still need to do.



A Test Case, Me a Yogi?!?

To research this article I visited with yoga therapy professional Dr. Noel McCluney on a recent trip to the Valley of the Sun chapter of the APMP in Phoenix, AZ. I attended two very different yoga sessions to experience some the variety of ways yoga is practiced and understood.

My first experience with yoga was with a small group of therapists and integrated both the physical aspects of yoga and the spiritual. We were dressed comfortably in loose fitting workout clothes and sat on yoga mats (long, thin, non-slip pieces of fabric easily purchased at specialty yoga stores or online). We began by talking about our days and any noticeable aches and pains or stressful/negative interactions that we were trying to work through during this session. We continued by briefly chanting a welcoming phrase.

One of the participants was a music therapist and had learned a "healing African chant" at a conference and brought it back to share. I was a little skeptical at first and was allowed to listen in and join if I felt comfortable. The melody was haunting and was sung/chanted in a round format. After a few minutes of chanting we began to focus on our breathing.

Breathing is the first and most important aspect of yoga. During my trip I was told on numerous occasions that I was breathing inefficiently. Apparently many of us (those unschooled in yoga) are breathing inefficiently. We should exhale twice as long as we inhale to fully expand our lungs and rid ourselves of any bad air/toxins left in our system. We should also breathe using our diaphragm (a large muscle in the center of the torso), which when used will cause one's stomach to expand with inhalation, as opposed to breathing shallowly into the chest. This technique is known as "belly breathing" (also diaphragmatic breathing, abdominal breathing, or deep breathing) for obvious reasons, and in yoga practicing belly breathing with the double-length exhalation is known as "the complete breath."

When we are stressed or angered, we breathe in short bursts or hold our breath, which constricts the flow of oxygen through our bodies and makes us more anxious and take shorter breaths and so on in an endless loop. Taking the time to stop and focus on our breathing makes us feel physically better, which then allows our brains to react to the stressor without added pressures. Do not believe me? Try it in traffic, and you will actually feel a little better about the guy who just cut you off.

> *"Breathing is the first and most important aspect of yoga."*

Once we were all breathing more or less the right way we began with poses or *asanas*. Dr. McCluney explained that there are many styles of yoga that focus on poses, or Hatha yoga. These different styles use poses of differing difficulty; they may require a student hold a pose for a long time or may have the flow from one pose to another. Generally, the styles of yoga may have different focuses, such as strength building, relaxation, or increased flexibility.

This particular class was conducted at a more aerobic-intensity designed to accelerate the heart rate and tone muscles for endurance. Before my yoga research started, I had some basic knowledge of yogic poses (mostly from television) and knew that it was supposed to be a good way to relieve stress. What I did not know is how much of a workout it could be! My classmates were not strangers to poses or the rapidly increasing speed, and I often struggled to keep up. Dr. McCluney reminded us all that we were not in competition with each other but should listen to our bodies about when we may need to take a break or when we could challenge ourselves. She also came around to each of us and "assisted" or gently pushed us deeper into a pose after she had demonstrated it in words and with her body.

This was a huge help since, never having done yoga before, I was unclear how things were supposed to feel or what muscle group I was supposed to be working on. She was also able to tell based on how I initially went into the pose that I was having lower back pain related to an old leg injury. By consistently doing yoga she believed I would be able to increase flexibility and decrease overall pain in my problem areas. I thought she was a psychic.

The overall goal of the yogic *asanas* is not only to increase flexibility and tone of muscles and joints but also to positively affect internal organs, nervous system, and blood circulation. You must continue the complete breathing method while getting into and holding the poses with the most beneficial aspect occurring while you are holding a pose.

After about 50 minutes we began the "Savasana" or relaxation portion of class. We lay flat on our backs in dim lighting with soothing music playing. Dr. McCluney sang words and walked us through tightening and relaxing different portions of our body (known as progressive muscular relaxation) until all of me felt like a rock melting into the earth. As I was enjoying being a rock for a few minutes, she raised the lights, and we all sat up on our mats and checked in with how we felt now after the session in comparison to how we felt before.

Me a Yogi! (Day 2)

Yoga class number two started similarly with a general check on aches, pains, and mood but was a much larger class with an age span from early 20s to early 70s, equally mixed with men and women. This class focused on accomplishing poses correctly as opposed to working up a sweat. I thought I was prepared to begin breathing exercises when the teacher threw us a curve ball—we had to walk around the room. Thinking this was some sort of trick, I mimicked my classmates walking solemnly but aimlessly around the spacious studio.

The point of the exercise was about being mindful—we almost always put the same foot forward (think the old adage about the "best" foot) when we walk so often that we do a little jig getting off moving sidewalks in airports to put the "right" foot first. We do so many things mindlessly that literally the first step in changing how we do things is to notice how we are doing them.

The ultimate goal of yoga is to reach enlightenment—complete insight and understanding of everything. An interim goal would be to reach enlightenment about one's self and to recognize how we walk, talk, think, and acknowledge not only how we are doing something, but why and perhaps even if we could do something better. This is more easily said than done with many of us living and working in a reactive and rushed mode. Only once we accept can we hope to change.

Class continued with more *asanas* on our yoga mats, some of which I was beginning to recognize, at a much slower and more purposeful speed then my previous experience. The teacher again came around to assist (and seemingly psychically comment on my aches and pains). I learned what was harder than moving swiftly from pose to pose—keeping a pose. Some poses are designed to be held longer than others; however, the trick is to remember to keep breathing while keeping the right muscles tensed and the right muscles relaxed to perfect the pose. No easy task.

The class progressed to a similar relaxation period as Dr. McCluney's class the day before, with the yoga instructor talking us through tightening and then relaxing different muscle groups until we were all rocks melting into the earth. We concluded class with the phrase "Namaste" ("I salute the god within you" in Sanskrit) and a bowing motion with our hands in a prayer form in front of our hearts. Both the word and the motion symbolize recognition of the divine spark in each of us and is a sign of mutual respect. It can be done as a greeting and/or as a farewell and is a peaceful gesture.

After two days of yoga classes, I was excited and very sore. I boarded the plane back home with renewed purpose: I was going to find the yoga class that was perfect for me. My first class was too energetic for a beginner and too daunting. My second class was too relaxed. So I began my search for one that was just right.

What Type of Yoga is Right for You?

As there are stars in the skies, there are types of yoga schools, teachers, and options. While some yoga focuses on building strength or flexibility, others focus on relaxation and still others can be tailored to your specific needs. So, if you are considering yoga, try calling the studio or gym, and ask them to give you a general description of the class format, intensity, and population that usually attends. Ask about the credentials of the teacher. Currently, there is no mandatory licensing for a person to officially become a yoga instructor. However, if they are a registered yoga teacher (there are numerous organizations that register yoga teachers), they will have at least 200 hours of training, or if they are certified in a particular style of yoga such as Iyengar, they will have much more knowledge then most general non-certified instructors. This will help you determine if this is a class you are looking for or open to trying.

A quick google.com search of available yoga classes in my area (there are four within a mile of my house) come up with a Bikram Yoga Studio, a pre-natal yoga class, yogic meditation, yoga for relaxation, yoga attached to a fitness gym, and yoga offered at a dance studio. There are more than 300 places (spas, gyms, studios, etc.) to take yoga in the Washington, DC/Baltimore region alone. The opportunities and varieties of ways to experience yoga are endless, particularly in a metropolitan region.

If a class is not for you, try a yoga DVD or a book to find out more. Amazon.com and GAIAM.com have many options for all levels of interest and ability. Many yoga studios also offer a free class or a discounted rate for first-time yogis and will often have yoga mats for you to use.

How Can Proposal Professionals Benefit from Yoga?

According to 2000 Gallup Poll titled “Attitudes in the American Workplace IV,” 80 percent of workers feel stress on the job, and half of them feel they need help learning how to manage stress, while the other half agree that their coworkers need help managing stress. In a follow on survey conducted in 2001, 40 percent of workers described their office environment as “most like a real life survivor program.” The American workweek lengthens every year, and we are the reigning world record holders for long working hours (we beat Japan years ago and have increased our lead ever since). If working long hours were an Olympic event, proposal professionals would win gold medals every time. Study after study links long hours to stress and stress to a host of ailments including but not limited to: muscle and back pain, headaches, high blood pressure, heart problems, diabetes, skin conditions, asthma, arthritis, depression, and anxiety. As proposal professionals, we are acutely at risk for these and possibly other health issues.

Regularly practicing yoga can help us decrease our stress reactions and so positively impact our physical and mental health. Yoga can take almost no time or equipment, just a few minutes alone in your office or in a quiet place outside on a lunch break. Think about it—a few minutes set aside in a hectic day pays positive health dividends that compound over time. You cannot make a lump sum payment on your health and should approach your lifestyle with a marathon and not a sprint mentality to be most effective and enjoy your life to its fullest.

Namaste

We all work very hard and are very good at what we do but sometimes we forget to take care of ourselves. If a yoga class is not for you, try being mindful of your thoughts, emotions, and physical feelings, and work on your personal well-being in whatever way (nutrition, fitness, relaxation, meditation) that is right for you. This too is yoga, and this too can have profound effects on your health and life!

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Special thanks to Dr. Noel McCluney, Tempe Arizona.

Resources

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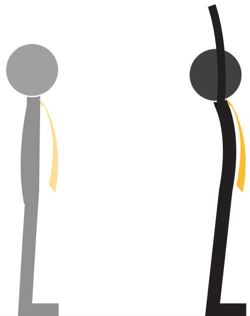
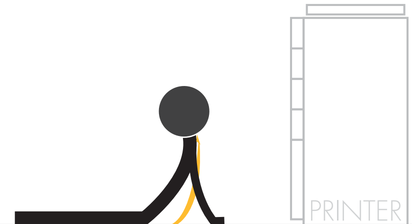
Colleen Jolly, AM.APMP, is a Principal at 24 Hour Company and Director of 24 Hour Company UK Ltd—a global professional proposal graphic and production company. She has won more than $15B in business for her clients. Ms. Jolly is responsible for book composition and cover design for the *APMP Journal* and regularly contributes articles. She is a frequent speaker at APMP conferences in the US and UK. She holds a BA in English and Studio Art from Georgetown University, and is active in leadership roles in many arts non-profit organizations. Additionally, she is a South East of England Woman’s Enterprise Ambassador. Ms. Jolly can be contacted at colleen@24hrco.com or colleen@24hrco.co.uk.





Proposal Manager (Mountain Pose)	**Where's My Stapler?** (Downward Dog Pose)	**Is the Toner Low?** (Cobra Pose)

Proposal Manager Pose is the basic standing posture where the body is in perfect harmony and balance.

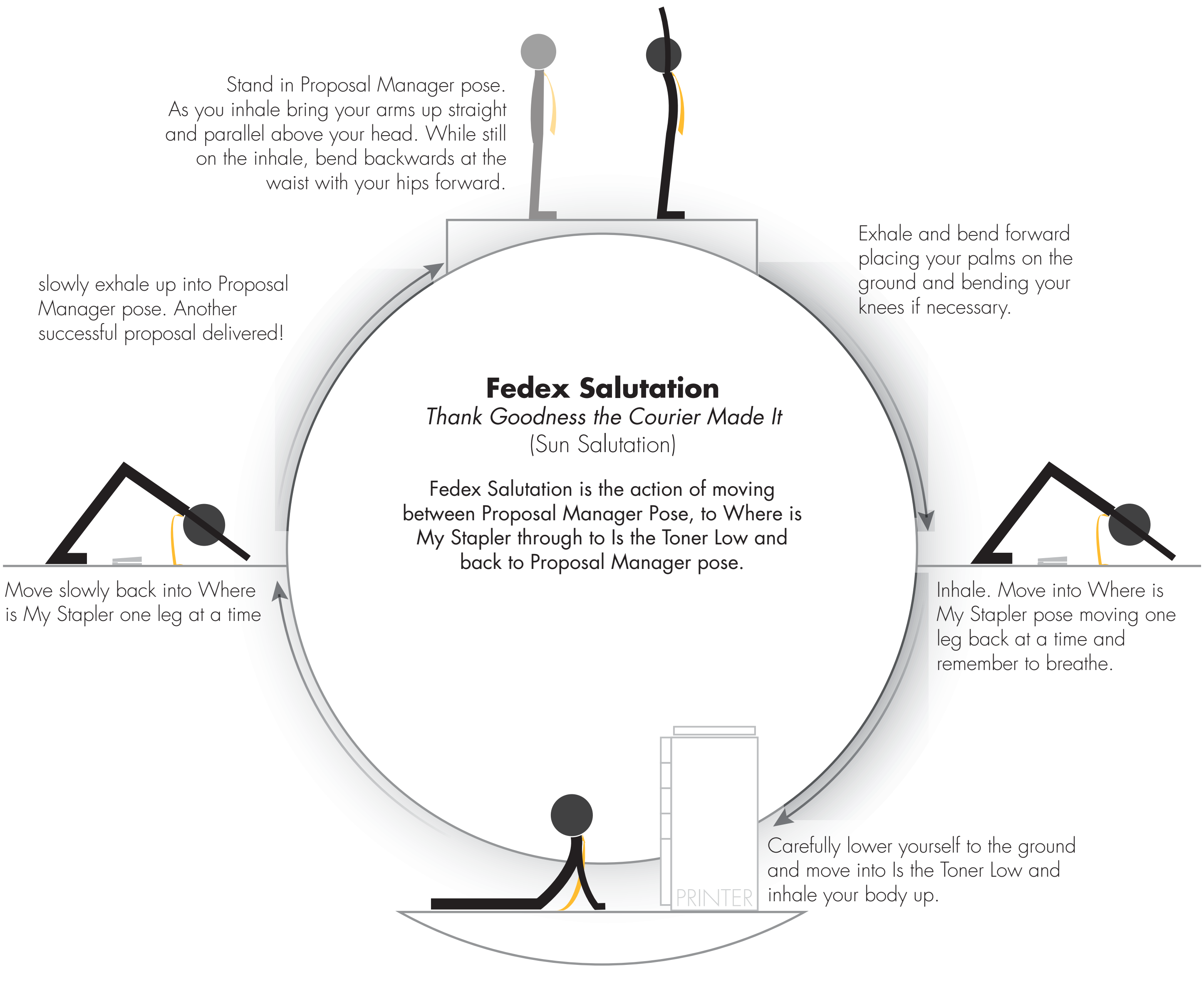
Stand with feet together and arms hanging loosely at your side. Open your chest by inhaling and push your shoulders back. Make sure you are equally balanced on each leg and look straight ahead. Take a few belly breaths and raise your arms above your head arching your back while intaking breath.

The Where is My Stapler pose stretches the lower back and hamstrings.

Start on the floor on your hands and knees. Lift your tailbone and bring your knees off the floor and stand on your toes so that you form a ^ shape. Place your feet flat on the floor (try to keep your legs straight), look at your navel, and consciously think of lifting your tailbone toward the ceiling. Stretch and return to the original position.

Is the Toner Low Pose helps to align the spinal column and open up the heart.

Lie on your stomach with hands at either side of your chest. Slowly inhale and lift your chest up off the floor with your hips still firmly planted, your shoulders should be relaxed and elbows slightly bent. Check status of toner for 10-15 seconds and exhale back to the floor.



Fedex Salutation

Thank Goodness the Courier Made It

(Sun Salutation)

Fedex Salutation is the action of moving between Proposal Manager Pose, to Where is My Stapler through to Is the Toner Low and back to Proposal Manager pose.

The Big Proposal Management Study

By Christopher Kaelin

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Big Proposal Management Study 2009 The Big Proposal Management

Did you always want to know where you and your company stand with regard to proposal management, and how you compare to your competition? Well, here are the answers. In December 2008 and January 2009, APMP and CSK Management conducted global online research to further explore the world of proposal management and to gain a better understanding of the state of our fascinating profession. The analysis provides greater insight into a wide range of topics: proposal process, resources, culture and work environment, trends, tools, and education.

Survey Setup and Response Structure

The questionnaire was sent out to more than 3,600 email addresses worldwide. With the valuable contribution of almost 400 respondents, the response rate was 9 percent, which is very satisfying. The responses included:

- 56% from North America, 41% from Europe, 2.3% from the Asia-Pacific region, and 0.6% from South America or Africa.
- 55% from males (and 45% from females, as you would expect).
- 58% from respondents who work in the IT industry; 9.2% in the area of management services; consulting, or recruiting; 7.8% in the telecommunications business; 6.5% in the defense industry; 3.4% in the healthcare sector; and 3.2 % in the financial services business.

The average respondent has about 8.5 years' experience in the field of proposal management. Sixty-eight percent of the respondents indicated that they work in the commercial area, and 58 percent in the government area. 8 percent indicated that they also work in the non-profit area.

Almost 50 percent of the survey participants are senior employees or team leaders, and 25 percent are department heads or higher. Sixty-four percent are bid/proposal managers, and 13 percent work in sales or business development.

The study shows some interesting (and some unexpected) findings about the proposal management community and its latest trends. Let us have a look.

1 Our Biggest Challenges

Not surprisingly, the biggest issues for proposal professionals are the lack of resources (66 percent) and time (56 percent).

"A fool with a tool is still a fool": Only 17 percent of the respondents reported that they do not have the right tools available. Only 12 percent claimed that their proposal process is not appropriate. Other typical issues mentioned were "lack of sales cooperation" or "poor opportunity qualification." Figure 1 identifies the percentage of responses to each critical issue/biggest challenge.

Generally, processes are fine

So, processes are okay. Sixty percent of the respondents consider the level of detail of the proposal process in their company as "just right," and only 3 percent report that the proposal process is not defined in their company at all. Only 11 percent consider their proposal process "too detailed." In addition, 26 percent claim that the process is okay, but nobody follows it.

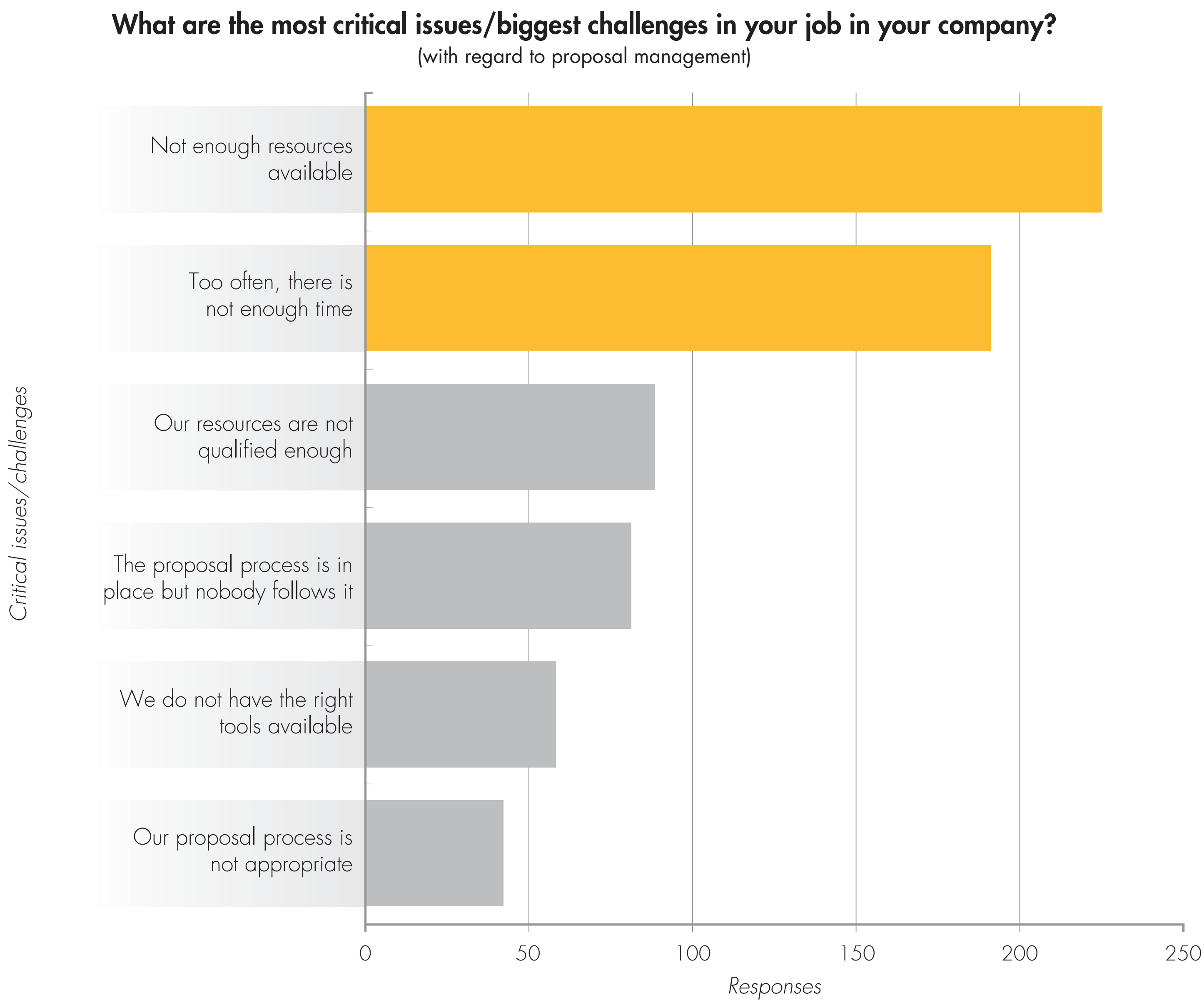


Figure 1: The biggest issues for proposal professionals are lack of resources (66 percent) and time (56 percent).

Source: Big Proposal Management Study 2009 by APMP and CSK

2 Our Work Environment

The lack of resources and time is also reflected in the relatively high workload. In fact, proposal people work a lot. Forty-three percent of the respondents report that they work 46 hours or more on average. During peak times, more than 86 percent report working more than 46 hours, and 60 percent report more than 50 hours. Actually, there was no significant difference between different roles or hierarchical levels. Forty-six percent claim that the availability of resources is "rather short." But still, most of the respondents make positive statements about their work environment. However, many answers indicate that they are not fully satisfied with the way that bid/proposal management is set up in their company. Figure 2 identifies how respondents rated their work environment.

Interestingly, only 24 percent indicated that they receive a bonus payment based on the achieved win rate or capture rate.

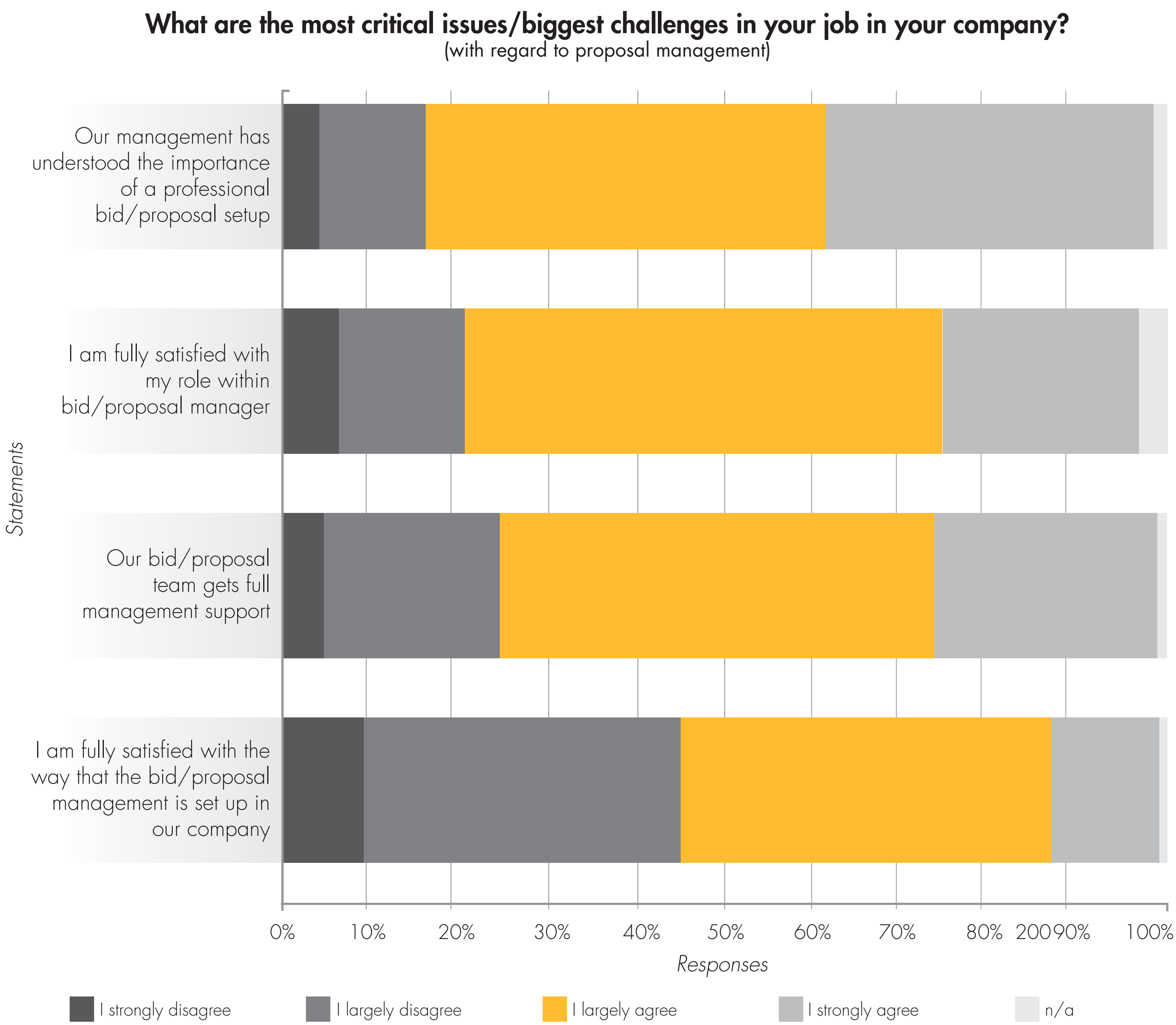


Figure 2: Despite the long working hours, proposal people seem to like their job environment.

Source: Big Proposal Management Study 2009 by APMP and CSK

3 Win Rate—Reality and Perception...

Here we have a problem. We asked for the win rates that companies achieve, or, in other words, we asked for the number of successful deals against submitted proposals. The participants reported an average win rate of more than a respectable 40 percent.

In addition, we also asked about the average number of competitors that also submit a proposal. The average result is between 4 and 5. Our own observations confirm this number as a cross-industry figure. Logically, assuming that there is only one winner in most of the deals, and assuming we have a representative sample, the resulting win chance is (statistically seen) about 20-25 percent (which is in line with our own observations from our experience, too). However, this is much lower than the 40 percent stated above. One could argue that the respondents (almost 400 people) might belong to a not-representative subset of companies that is outstandingly successful. Also, the number of deals with more than one winner is too small to change the statistics dramatically. In fact, we suspect that the perceived (and reported) win rate is often overestimated. Figure 3 details the responses to the average number of competitors and their win rate.

Chance to double your business?

This leads us to the alarming conclusion that quite a few companies might not be fully aware of the most important key performance indicator of proposal management (Figure 4)! Imagine you were able to boost a win rate of (real) 25 percent to (also real) 40 percent.

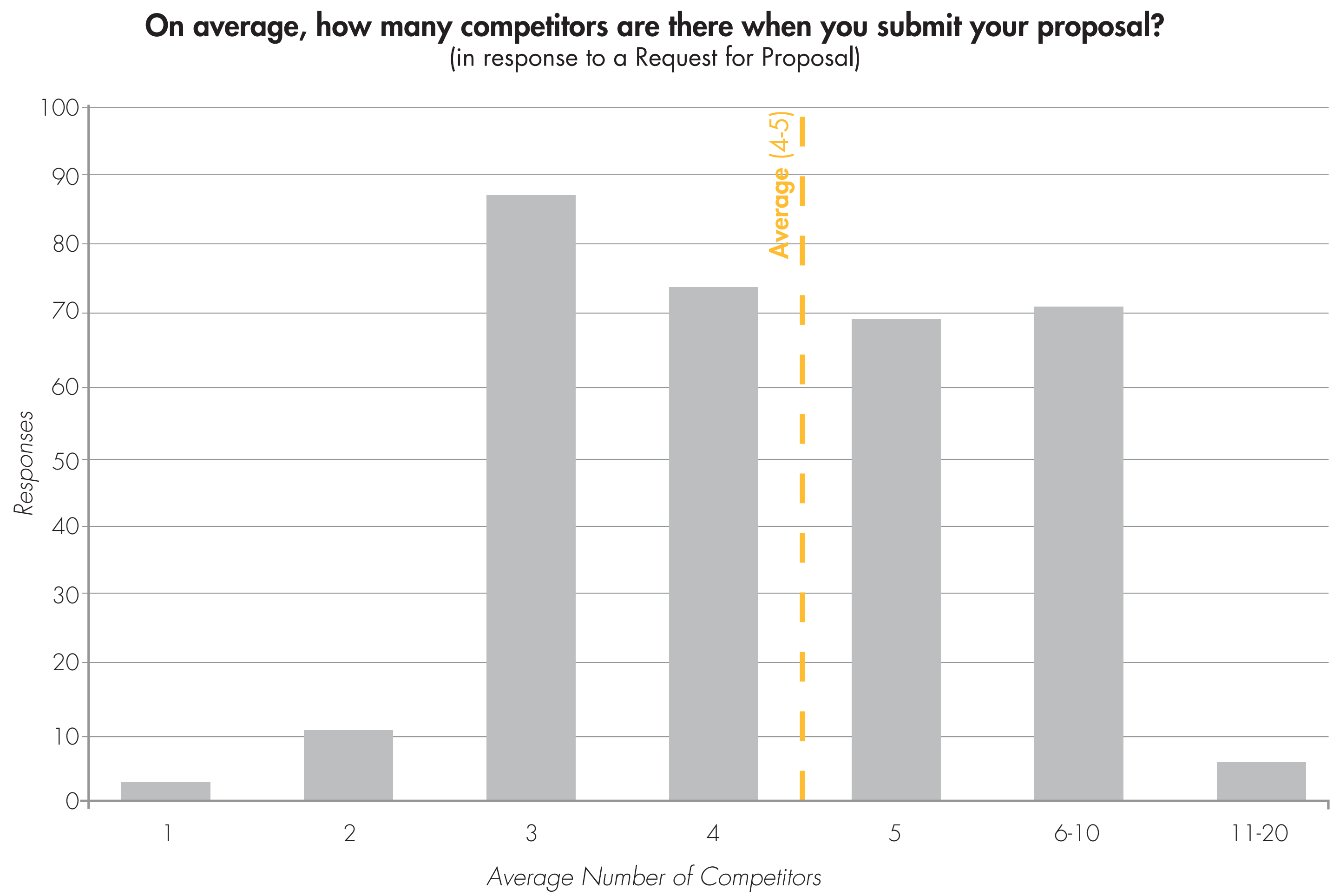


Figure 3: Despite the long working hours, proposal people seem to like their job environment.

Source: Big Proposal Management Study 2009 by APMP and CSK

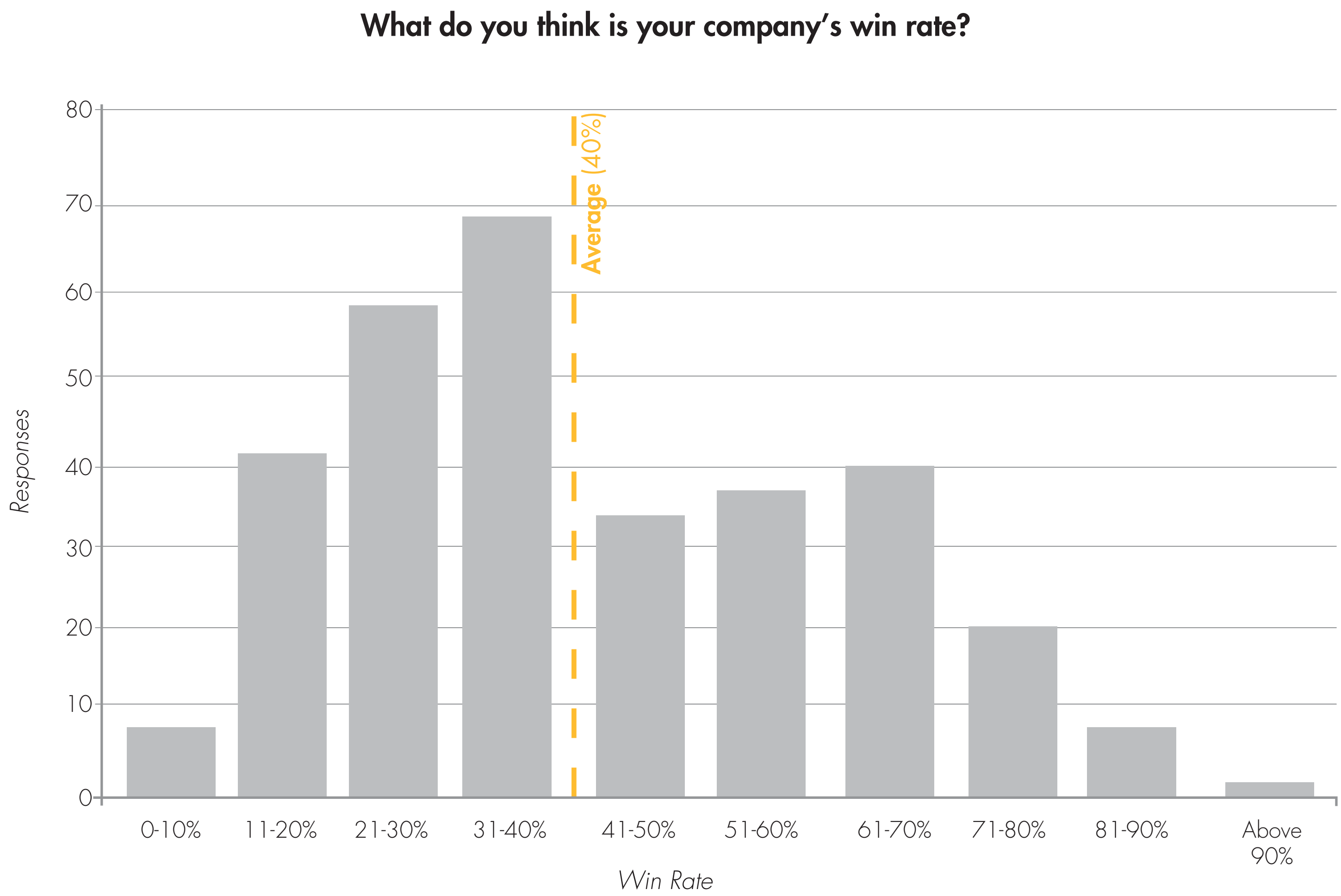


Figure 4: There is a clear mismatch between the reported average number of competitors and the stated win rate. We suspect that quite a few companies are not fully aware of probably their most important key performance indicator of proposal management!

Source: Big Proposal Management Study 2009 by APMP and CSK

4 Performance in Key Areas

So, if the perceived win rates are okay, what about the actual performance? We asked the participants how they rate their company's performance against best practices in each step of the bid/proposal management process. To sum it up, some of the results should be cause for concern.

Not surprisingly, companies seem to be generally good at the more simple, or unsophisticated, tasks like text formatting, production, and proofreading. Seventy percent or more believe that their company meets best practice standards in these disciplines. Respondents also indicated a relatively high confidence in some other core competences of proposal management: project management of proposal process, and RFP analysis. Management of staff in proposal center scored pretty high with 50-60 percent of the answers being "best practice or even better."

Massive improvement potential identified!

Looking at the more strategic disciplines, it becomes more of an issue. More than two-thirds of the respondents claimed that their company performs below best practice levels, or even far below best practices, in key disciplines such as developing proposal strategy and storylines, bid/no-bid decisions, and business case development. Almost a quarter rated bid/no-bid decisions as "far below best practice" in their company. A surprising result is that more than 60 percent rated price design below best practice levels.

Note that these areas are main drivers for business success.

5 External Resources

We also wanted to know how external resources—such as consultants, trainers, and freelancers—are used and for which tasks.

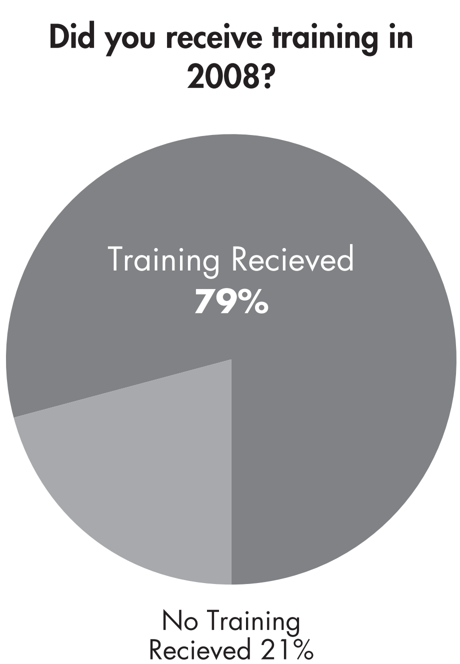
Overall, when it comes to critical tasks like business case development, RFP analysis, or bid/no-bid decisions, companies seem to be reluctant to hire external resources. However, looking at the responses regarding our findings regarding performance versus best practice standards, this might not always be the best decision.

Top 5 Operational Areas:

1. Translation (35% of all companies)
2. Graphic/illustration design (34%)
3. Technical or subject matter expertise (32%)
4. Text development, writing, and editing (20%)
5. Production, printing, binding, and packaging (30%).

Top 5 Non-operational Areas:

1. Training for proposal professionals (57%)
2. Training for sales people (46%)
3. Recruitment of proposal resources (28%)
4. Proposal process improvement (25%)
5. Training for other content contributors (19%).



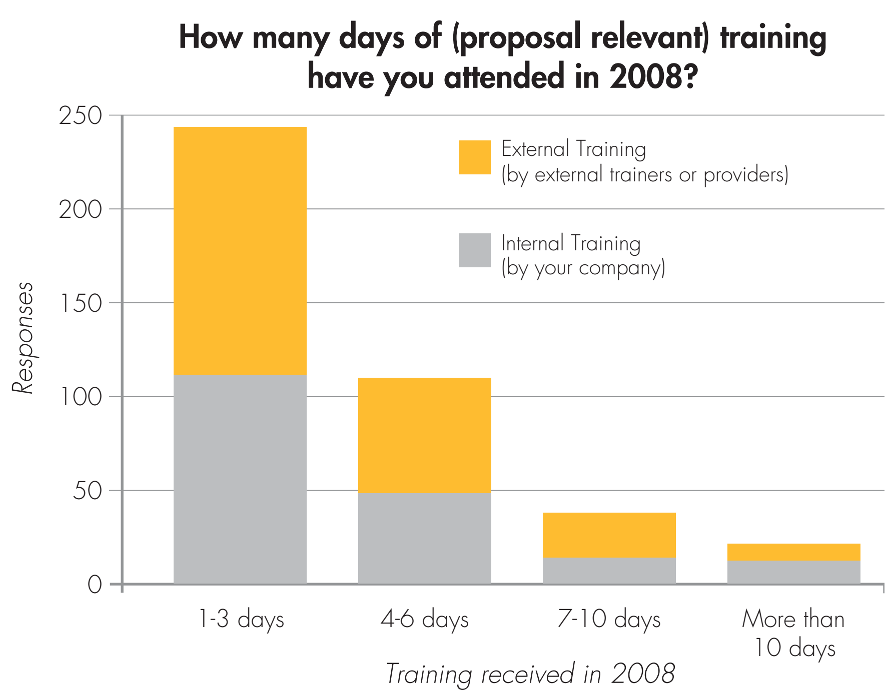


Figure 5: In 2008, 79% of the respondents received proposal related training. On average, they received 7.9 days.

Source: Big Proposal Management Study 2009 by APMP and CSK

6 Education and Training

Almost 80 percent of the respondents received proposal-related training in 2008. On average, they received 7.8 days of training, equally 3.9 days of internal training (provided by employees of their company), and 3.9 days of external training (provided by external trainers or training companies). Taking those into account who received no training at all, the average is 4.5 days (2 days of internal training and 2.5 days of external training). Figure 5 details the analysis of the training responses.

Most companies do not have a training program. Actually, more than 72 percent of the respondents' companies have no clear training program in place, which is remarkably low. Approximately 18 percent were offered training course(s), although there is no overall training concept in their company.

More training desired

As you probably expect, most proposal professionals would like to receive more training. However, we were surprised about the numbers: 86 percent think that other proposal-relevant training courses would be useful for them or for their team. In line with the performance rating, their number one training need centers around *proposal strategy and storyline development* (almost two-thirds of the respondents with stated training needs). But also *RFP Analysis* and *Process Management of Proposal Process* scored high (45 percent and 44 percent) as shown in Figure 6. However, only 32 percent of the respondents expect to receive the desired training.

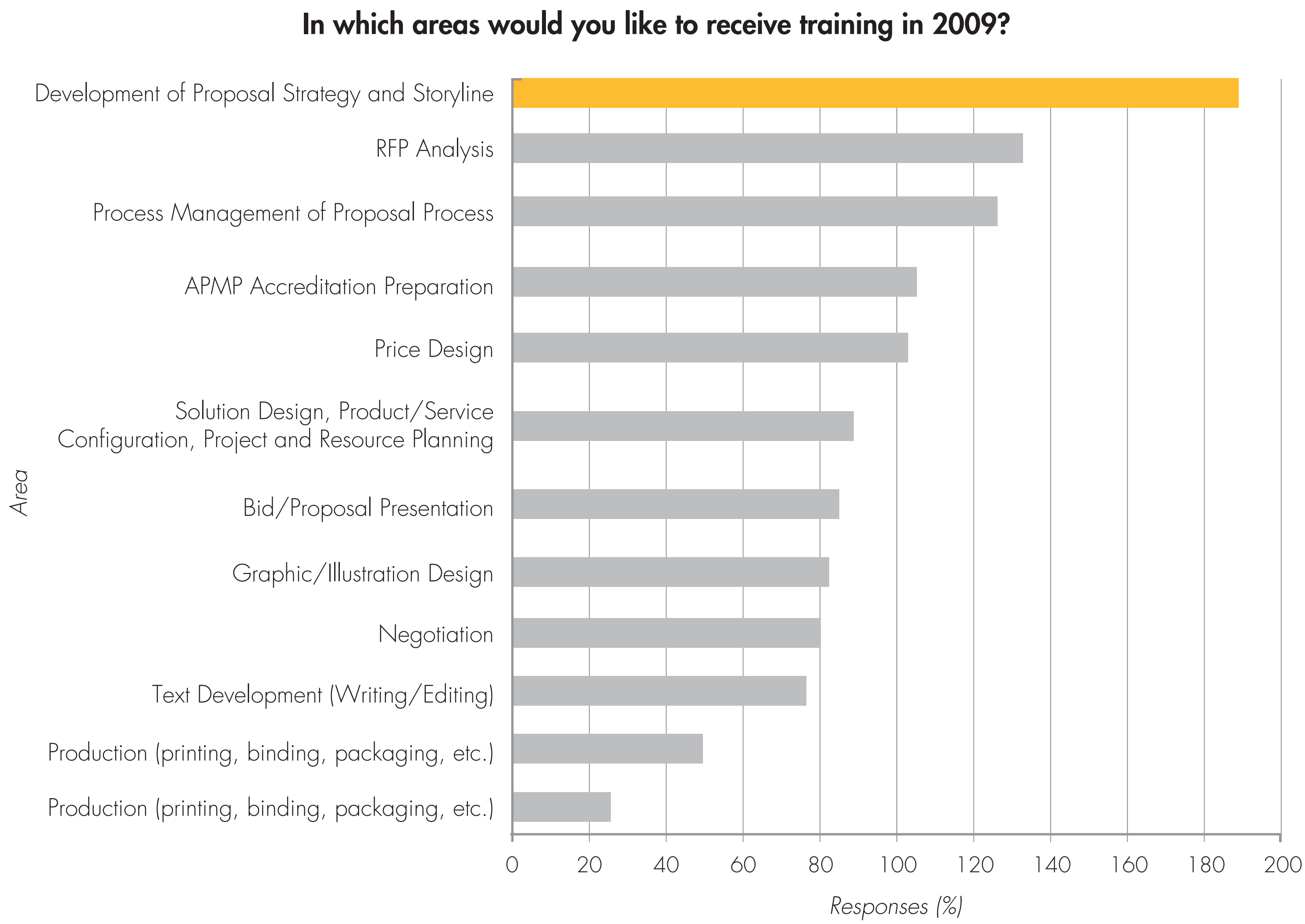


Figure 6: Proposal strategy, storyline development and RFP analysis were the most stated training needs.

Source: Big Proposal Management Study 2009 by APMP and CSK

7 Software Tools

We wondered whether companies use specific software tools (not including standard office applications such as Microsoft® Word, Excel, Powerpoint, Project, or Adobe® Acrobat), and for which part of the proposal process.

Almost 50 percent of the respondents reported that their companies use collaboration tools or specific software in the area of knowledge management. Almost 40 percent of the respondents use document management tools.

But only less than 30 percent of the respondents use specific proposal management software (workflow management, proposal project controlling) as shown in Figure 7.

Let us have a quick look at the software market, its brands and products. With more than 13 percent, Kadient's Pragmatech products clearly show the highest penetration among the survey respondents. However, the *Sant Suite* from The Sant Corporation enjoys the highest market awareness (48 percent), followed by Kadient/Pragmatech (45 percent) as detailed in Figure 8.

For which of the following tasks does your company use specific software tools?

(not including standard office applications such as Word, Excel, Powerpoint, MS Project, or Adobe Acrobat)

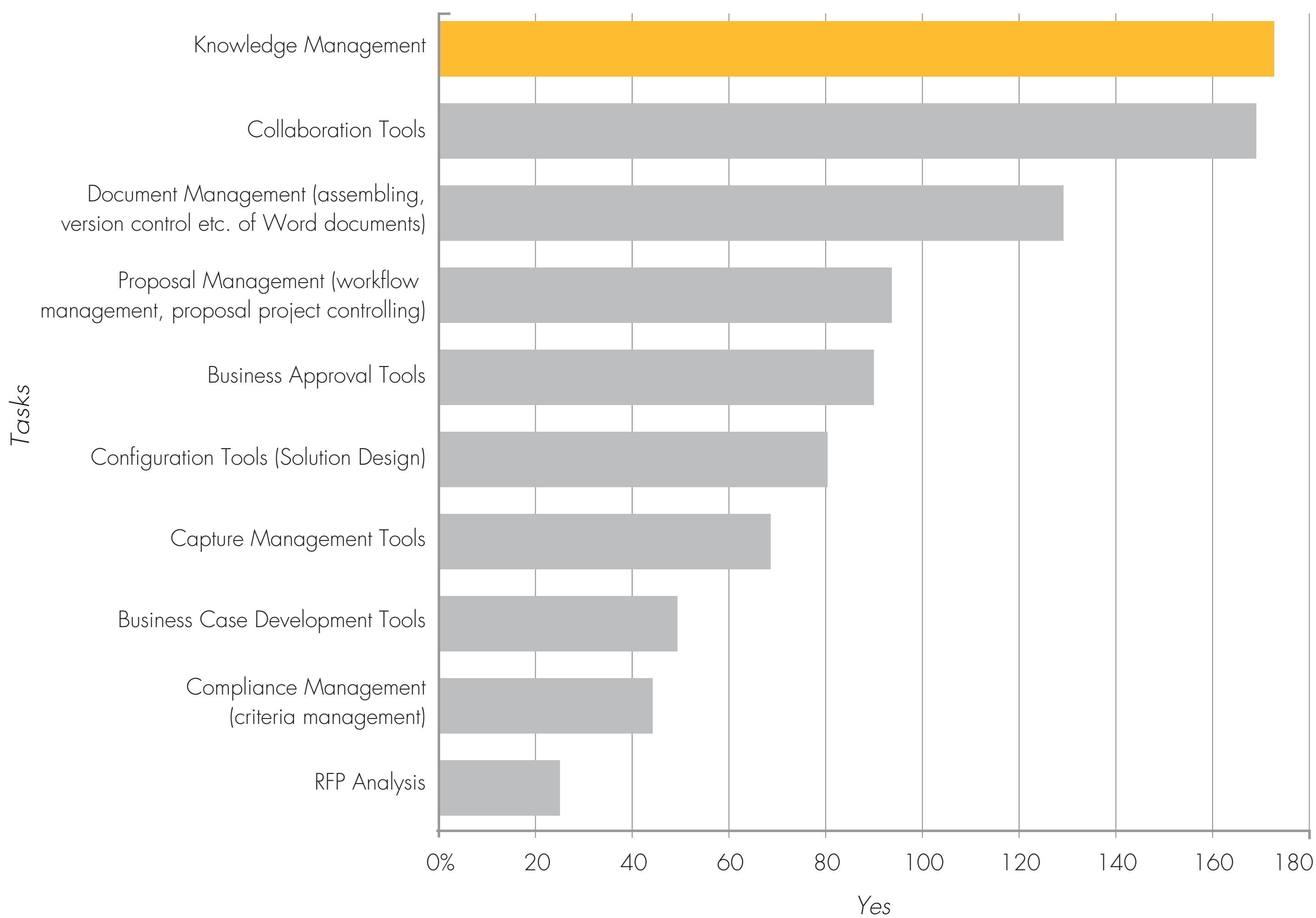


Figure 7: Knowledge management tools, collaboration tools, and document management were the most stated areas with software support.

Source: Big Proposal Management Study 2009 by APMP and CSK

Other products that were mentioned most were Deltek, SAP, Microsoft Groove, SalesForce.com, Lore International, and Pathagoras. Thirteen respondents use proprietary software. In terms of document management, Microsoft Sharepoint is the clear market leader (134 responses). Far behind were EMC Documentum (13), Xerox Docushare (11), IBM/Lotus Quickplace (8), and Hummingbird (7).

As mentioned earlier, only 17 percent of the respondents reported they do not have the right tools available. However, a well-established and custom-tailored software tool can save a lot of time, and time is a big issue for most proposal people, as we all know. So, what we actually take from this is the perception that the existing tools are usually not a cause for concern.

Which bid/proposal software suppliers do you know? And which of them supplies your company?

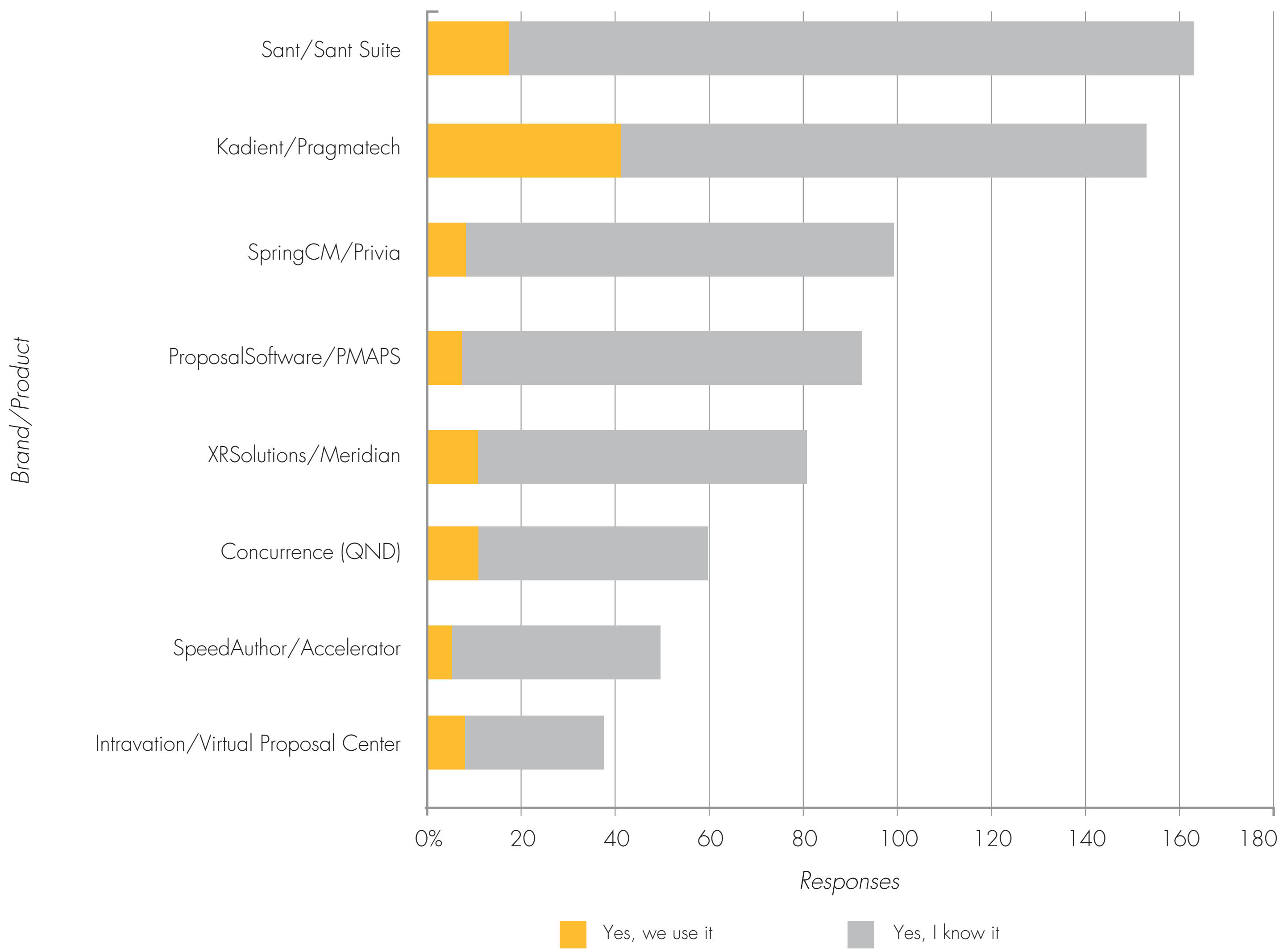


Figure 8: Although the Sant Suite enjoys the highest market awareness, Kadient's Pragmatech software is the most used software package to support the proposal management process.

Source: Big Proposal Management Study 2009 by APMP and CSK

8 Trends

In the survey, we tested a series of trend statements that we identified in 10 interviews we had conducted earlier. The reactions of the respondents largely confirmed our own experience that the discipline of proposal management is becoming more and more professional, leading to increasing requirements for proposal managers, but also leading to tougher competition. Figure 9 supports this result.

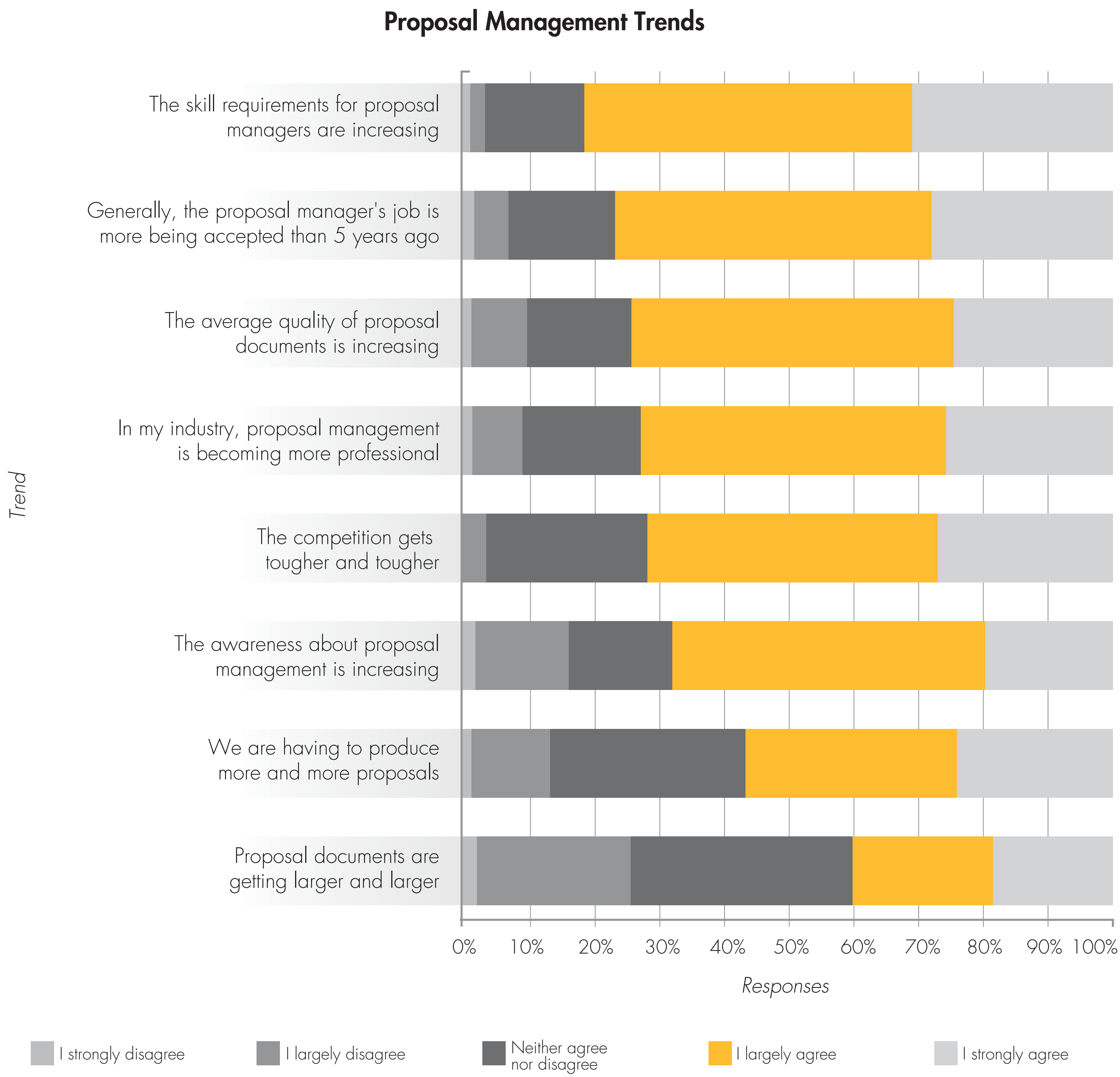


Figure 9: In general, it seems that the discipline of proposal management is becoming more and more professional.

Source: Big Proposal Management Study 2009 by APMP and CSK

Summary

- Limited time and resources are the biggest issues for most proposal people. As a consequence, they have a rather high workload.
- Most proposal people enjoy a rather high job satisfaction, although many respondents are not fully satisfied with the way that bid/proposal management is set up in their company.
- Bid and proposal processes are generally well defined, although there is often a lack of discipline in following the established processes.
- We suspect that the self-perception of win rates is often slightly unrealistic (meaning: more optimistic than real).
- Not surprisingly, companies seem to be generally good at the more simple, or less sophisticated, tasks like text formatting, production, and proofreading.
- More than two-thirds of the respondents claimed that their company performs below best practices, or even far below best practices, in key disciplines such as developing proposal strategy and storylines, bid/no-bid decisions, and business case development.
- Almost 80 percent of the respondents received at least one day of proposal related training in 2008, but 86 percent indicated a training need. However, more than 72 percent of the companies do not have a clear training program.

Generally, the use of software tools to support the proposal management process is still limited. But with increasing professionalism, we suspect that more and more companies will benefit from proposal-related software packages.

In general, the skill requirements for proposal managers are increasing, and the average quality of proposal documents is improving, too. At the same time, proposal managers feel they have to produce more and more proposals in a shorter time frame. However, the management attention is also increasing, and the respondents confirmed the ongoing trend towards more professionalism.

Study 2010:

We are looking forward to conducting a similar survey on proposal consultants next year. This will enable us to compare the inside-out view with the outside-in perspective.

About the Big Proposal Management Study 2009

The research was conducted between November 2008 and February 2009 by CSK Management and APMP. For more information, please contact christopher.kaelin@cskmanagement.com. More details about the Big Proposal Management Study 2009 can be found at http://www.cskmanagement.com/survey2009

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Agile Methods for Proposal Managers

by Wendy Frieman, PPM.APMP

Agile is an approach to software development that stresses frequent inspection, self-organizing teamwork, daily accountability, continual attention to end-user needs, and an unrelenting focus on results. Agile tools and approaches can help proposal professionals accomplish many of the same goals, albeit in a very different environment.

An Idea Whose Time Is Here

Introduction

Proposal managers can learn a lot from other disciplines. The art and science of proposal management are still evolving; processes in other fields are sometimes more mature and more refined. The methodology now referred to as agile software development, in particular, has much to offer to proposal professionals.

Although the agile approach cannot be applied to proposal management without adaptation, certain features and techniques are directly transferrable. The approach can help proposal professionals manage time, track progress, address conflict, and define objectives. Agile principles and tools have been tested on a broad scale—annual software development spending is in the hundreds of billions of dollars (the US Government alone spends more than $50B). By contrast, most proposal management methodologies are tested and reported anecdotally on a much smaller scale, and the proposal management industry is itself much smaller.

This article explores the potential application of the agile approach to proposal management by first introducing the principles and history of agile software development; second, discussing a selection of agile techniques that merit study by proposal managers; and third, offering some sources for additional research and training.

What Is Agile Software Methodology and Where Did It Come From?

Agile is an approach to software development that encourages frequent inspection, early release of code, self-organizing teamwork, daily accountability for results, and continual attention to user needs. It was formally introduced to the world through a document written in 2001 at a ski resort in Utah (Agile 2001). It grew out of a frustration on the part of developers with rigid plans and procedures, overbearing bureaucracies, and ever-increasing demands for documentation (Boehm 2002). These frustrations were shared by customers who saw massive budget overruns and schedule delays in most large software development programs.

A prime example is the US Federal Aviation Administration system for air traffic control, which overran its budget by $3B for more than five years (US Senate 2008). Although several years have passed since the creation of agile concepts to address such problems, concern over information technology (IT) spending remains high. A recent Government Accountability Office report found that 48 percent of Federal Government IT projects had to be "rebaselined" due to cost, schedule, or performance problems (US Senate 2008). Agile principles, therefore, have to be understood as a reaction to the more traditional "waterfall" approach to software development and its failure to deliver products on time and on budget (Chaos).

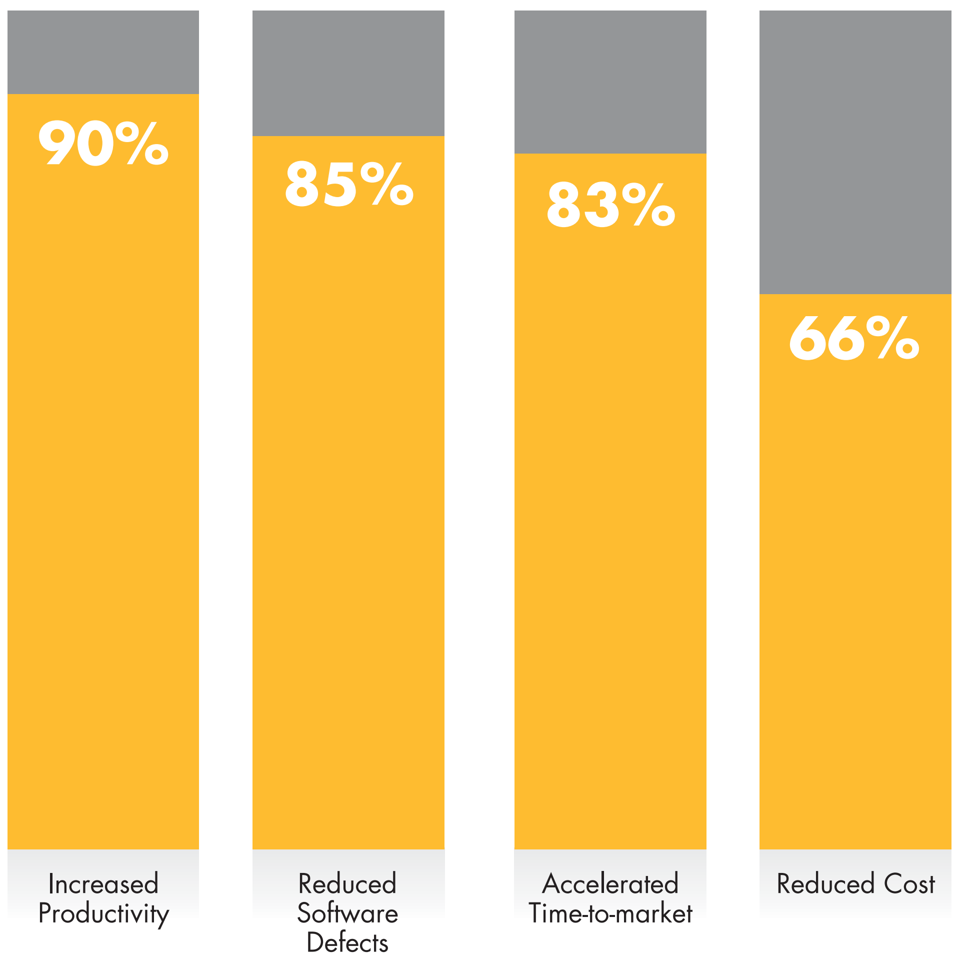
Dozens of Web pages, blog posts, books, articles, and PowerPoint briefings have been published since the release of the original document (referred to as a "manifesto"), and each has offered a slightly different perspective. The text of the original document itself is quite brief (Agile 2001):

"We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

- Individuals and interactions over processes and tools
- Working software over comprehensive documentation
- Customer collaboration over contract negotiation
- Responding to change over following a plan.

The degree to which agile methods have begun to solve long-standing problems in software development is still open to debate. A frequently cited survey of development teams in 71 countries recently concluded that "agile development is delivering meaningful and measurable business results. Respondents reporting specific improvements greater than 10 percent include: increased productivity—90 percent of respondents; reduced software defects—85 percent of respondents; accelerated time-to-market —83 percent of respondents; reduced cost—66 percent of respondents" (VersionOne 2007).

To be sure, the proposal environment differs from that of a software development team. Proposals have a shorter life span than most software applications and, therefore (one hopes), many fewer iterations. There is rarely an opportunity to test proposal content before the document is submitted. The proposal (assuming it is a competitive proposal) has to be developed in isolation from the "user," whereas in the software development environment this does not have to be the case, even though it often is. Nevertheless, there are many parallels.



Percentage of respondents who experienced improvements after implementing agile development (VersionOne 2007)

Which Agile Methods Are Transferrable to Proposal Management?

Software development resembles proposal development in important ways. The format for code is exacting and unforgiving, just as the proposal preparation instructions are rules that have to be rigorously adhered to. Proposal and software development are both team efforts that require individuals with a variety of disciplinary backgrounds. Both are subject to time and budget constraints. Although the proposal industry does not have a history of missing deadlines, the cost of meeting those deadlines is often high—in time, money, and physical and emotional health.

So it is not surprising that methods used effectively in one environment could work well in the other—some have already been transferred, albeit unknowingly and with different names. Over time, other proposal professionals will import a range of agile practices as they gain more exposure; in this discussion, the emphasis is on scrums, "chunking," establishment of priorities, working code, and burndown charts.

Scrums

The first feature of the agile environment that bears directly on proposal management is the scrum. Agile principle number six focuses on how work is measured and managed, and the interpretation of that principle led to the development of the daily "scrum" for the development team. The scrum is a status check of each chunk of work. Scrum-masters follow precise rules and a standard format. The meeting lasts no more than 15 minutes and each participant answers 3 questions: (1) What did I do yesterday? (2) What will I do today? (3) What obstacles are in my way?

Scrums are short, disciplined, face-to-face interactions; they force accountability and teamwork in a way that a distributed environment managed by email and phone calls does not. In some environments, scrums are followed by "scrum of scrums," short meetings of all the scrum-masters to address whatever obstacles have not been addressed in the individual scrums. Although anyone can attend a scrum, only core team members can speak. "Scrum mastering" is now a recognized expertise within the community, and there is an association that provides accreditation to scrum-masters, coaches, and trainers (Scrumalliance).

A scrum resembles a daily stand-up on a proposal, although most proposal stand-ups do not operate with the same rigor. Many proposal managers would benefit from scrum training and from

THE 12 AGILE PRINCIPLES are more explicit, but still leave room for interpretation depending on the specific circumstances:

1. Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.
2. Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.
3. Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.
4. Business people and developers must work together daily throughout the project.
5. Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.
6. The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.
7. Working software is the primary measure of progress.
8. Agile processes promote sustainable development. The sponsors, developers, and users should be able to maintain a constant pace indefinitely.
9. Continuous attention to technical excellence and good design enhances agility.
10. Simplicity—the art of maximizing the amount of work not done — is essential.
11. The best architectures, requirements, and designs emerge from self-organizing teams.
12. At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.

more research into the techniques that scrum-masters use. Scrum-masters are skilled professionals who learn specific tools for facilitating meetings, communicating clearly, and escalating issues within the bureaucracy—attributes that proposal managers can always improve upon and many lack.

Although the three canonical scrum questions (What did I do yesterday?, What will I do today?, and What obstacles are in my way?) might not be applicable to all proposal participants, this is a good place to start. The payoff is greatly increased accountability and visibility. If each contributor has to report succinctly (remember the 15-minute time limit!) on yesterday's progress, the social cost of failure to perform increases dramatically. Visibility and communication also improve. Because team members observe progress on a daily basis, the team as a whole is more confident that the proposal will be delivered on time.

Chunks

Prioritization of features means that software development can be broken into "chunks" or "stories," each one of which can be accomplished within a reasonable timeframe. As a result, it is possible to deliver working software every few weeks (agile principle number three). This contrasts with a traditional approach that permits release only after the code has been fully tested and approved with all its features. In software development, the chunks are quantifiable, testable units of development effort. The chunk is considered complete when the corresponding code has been written and tested (Breitman 2002). Although the timeframe for stories is one-to-five weeks, proposal cycles are often shorter, and the chunks have to be smaller.

Although storyboards sound similar to agile stories, the scope storyboard is usually defined by the requirement or content it addresses, not by the amount of work it will take to complete it. Stories are designed to be finished within a defined period of time. It is also true that in a proposal environment there might not be an exact equivalent of the test and acceptance process, at least not at the level of the chunk.

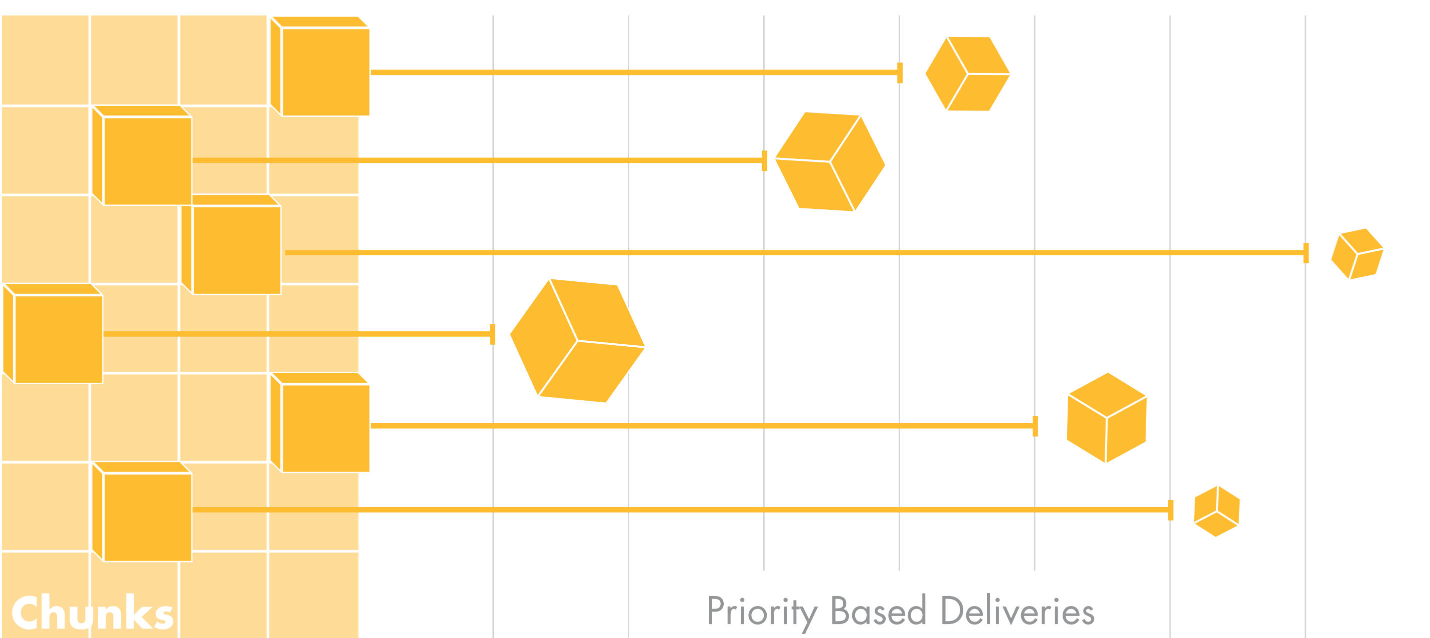
Yet chunking is critical, and most proposal managers do it instinctively through the assignment process, which is then documented in writers' packages, storyboards, annotated outlines, and other techniques. Particularly on large bids, and particularly for those new to proposals, the size and complexity of some proposal tasks can seem overwhelming. Solution diagrams, bases of estimates, pricing strategies, and transition plans can all appear to be too big to tackle. In an agile world, the proposal manager breaks these down into manageable pieces that can be attacked one at a time and reported on at regular intervals.

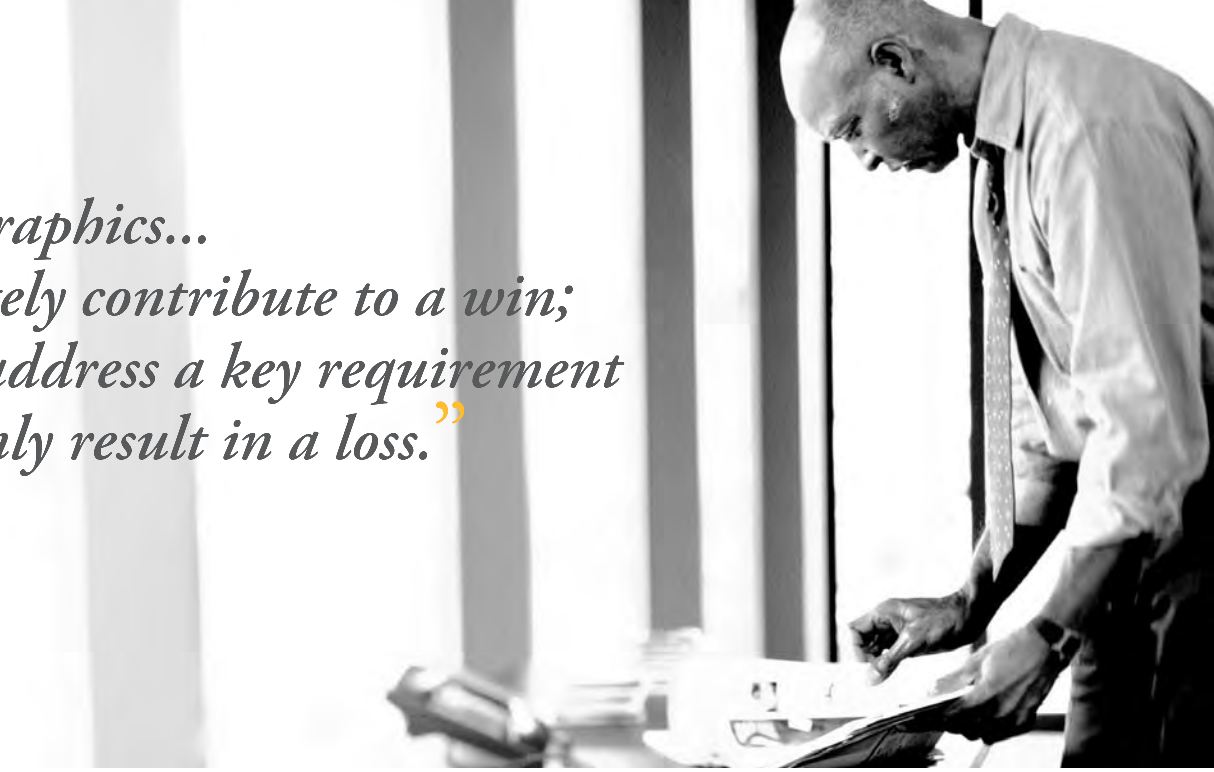
Although many proposal managers have a process for making assignments, the approach to "chunking" in an agile world is more granular and more modular. Understanding how this technique is applied to software might help proposal managers divide tasks among a larger group of people, and would help a hand-off process in the event that one member of the team is suddenly not available. It also makes it possible to respond to change more effectively.

The chunking process is not as easy as it sounds, however. As one author pointed out, it is like "cutting a whole chicken into its familiar pieces. Even though the joints may not be immediately visible, there are places to do the dividing that are more appropriate than others. But if you are cutting up the chicken for the first time, as I recall I once did in my parents' kitchen, you may encounter great difficulty because you do not know where the joints are" (Schalliol).

Prioritization

Agile principles demand a focus on the critical features first; less important features are planned for future releases and constantly evaluated to see if they are worth the time and expense required. This forces attention to software features that will be used. One study concluded that 20 percent of the features of an average application are often or always used, whereas 64 percent are rarely or never used. Time spent on unused features is a large con-





"Effective graphics... can definitely contribute to a win; failure to address a key requirement can certainly result in a loss."

tributor to delays in final release (CC Pace 2008). The proposal equivalent would be excessive time spent on technical details that score low in evaluation points or do not directly contribute to the win themes and discriminators.

Prioritization of features means that the development work can be broken into "chunks" or "stories," each of which can be accomplished within a reasonable time frame. As a result, it is possible to deliver working software every few weeks (agile principle number three). This contrasts with a traditional approach that permits release only after the code has been fully tested and approved with all its features.

A proposal manager is constantly engaged in triage—knowingly or unknowingly. Getting mired down in all the details can preclude attention to the overall proposal themes and messages; at the same time, failure to ensure compliance with all requirements can result in the proposal being eliminated. Knowing how to balance priorities on any given day is learned intuitively over time. The agile solution to this problem is relatively straightforward in the software development environment: the team works on the 20 percent of the features that are most likely to be used. Although there is room for debate about priorities, the criterion is easy to define and understand.

In the proposal world, however, a different way of assigning priorities has to be developed and refined. Lead time is one factor—there are certain activities that, if they are not started early enough, will not be completed in time regardless of how many person hours are applied. When deadlines are approaching, adding 3 people who work 10 hours a day is not the same as having an additional 2 weeks of time. Whether a particular aspect of a proposal will cause the proposal to win or lose is another factor. This is why it is distressing to see the proposal manager on a large effort sweating over em dashes or commas, excellent examples of details that are unlikely to cause either a win or a loss.

Effective graphics, however, can definitely contribute to a win; failure to address a key requirement can certainly result in a loss. Lead time and contribution to win/loss are just two suggestions; more work needs to be done to arrive at a repeatable, predictable method for assigning priorities.

This author, for example, starts with the formal proposal evaluation criteria and assigns priorities based on the degree to which the activity contributes to points for those criteria. That ranking is then adjusted for less formal criteria that are implied but stated, or criteria known to be important based on a relationship with the customer. Finally, items that might not be highly ranked from an evaluation perspective but require a long lead time or an excessive amount of work are factored into the list. The proposal manager makes decisions about how to allocate time and dollars based on that ranking.

Thus, on one recent proposal, resumes were in a position of prime importance, and the proposal manager scrutinized each one in much more detail than might have been the case on other proposals. If a candidate dropped out, the proposal manager dropped everything else to find a replacement. Evidence of the team's ability to innovate was also a top priority because it was both highly scored in evaluation points, and also known to be a weakness of the team. The list of specific priorities will differ from one proposal to another, but the method for arriving at them needs rigor and consistency.

Deliver Product Early and Often

Early delivery of valuable software is the number one agile principle, and it is a reaction against continual schedule delays that result in part from overly ambitious plans for software applications with extensive and sophisticated features, many of which are never used. Agile principle number seven, which points to working software as a measure of progress, seems intuitive until one understands that in a traditional software development environment, documentation requirements at various stages compete for the time and effort needed for the development of the code itself.

Development teams began to spend a disproportionate amount of time on collateral documentation—project plans,

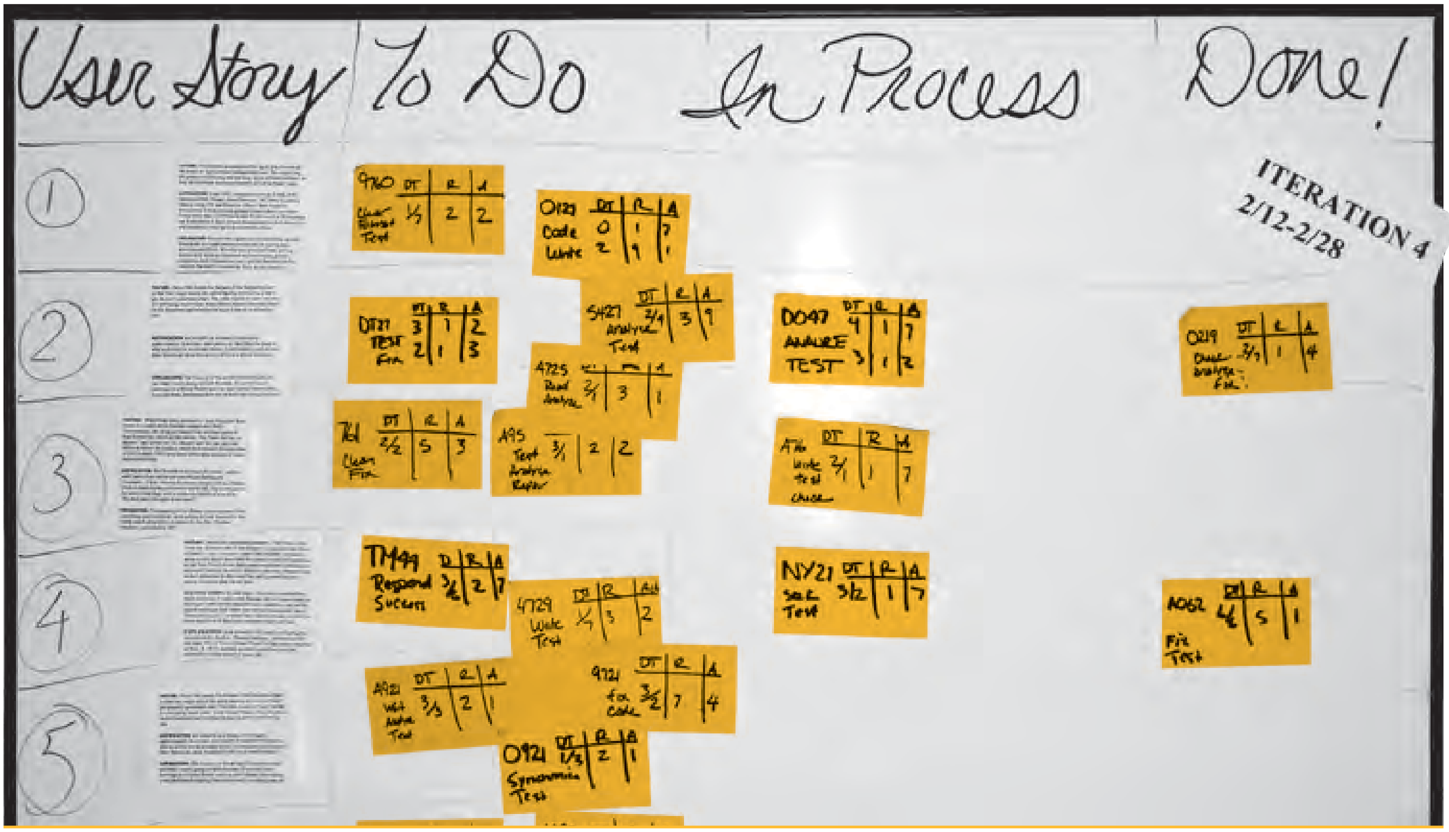


Figure 1: Project Planning in an Agile Environment. Project plans can be simple, low-tech, and improvised, and still be effective.

designs, configuration control documents, projections, and the like—because they were often evaluated based on their ability to deliver these documents. In an agile environment, documentation is respected, but the actual software is what is evaluated.

Agile development methods have a single focus: the development of working code at short intervals. All other tools and processes support this objective. In the proposal environment, proposal text is the obvious counterpart to working code. At certain points in the proposal process, it is essential to see the content generated by each participant daily to stay on schedule. In this respect, the proposal development discipline has already adopted agile methods in the form of the proposal wall.

Ideally, the text of the proposal is posted on the wall of the proposal room, or its virtual equivalent, each day for comment and feedback. Although not a test in the sense that the term is used for software, the proposal wall accomplishes two critical functions: it demonstrates exactly what has been accomplished over the past day, and it provides visibility into the content of the proposal document. Moreover, daily posting of text reveals quickly which authors cannot produce text within the required timeframe.

Proposal managers intuitively understand the importance of the working code as a measure of progress. It is painful to watch a team conceptualize and discuss for weeks on end only to find that there is insufficient time to articulate their concepts in words and graphics. Forcing contributors to generate text early in the process gets creative juices flowing and instills a habit of producing text.

The longer the proposal manager waits, the harder it is for the manager and the participants to flesh out ideas. At the same time, it is possible to start writing too early before concepts are gelled. This results in the need to rewrite and causes frustration for the contributors. That is why the definition of working code needs to be expansive. It might not always be pages of text, rather, a diagram, storyboard, case study, or detailed outline, but there should be some kind of deliverable.

Likewise, for certain participants, proposal text is not always a good measure of daily progress. Pricing strategy, teaming and subcontracting, engineering design, and competitive intelligence all involve activities that feed into the proposal, but might not generate written artifacts. One example is negotiations with subcontractors. The final agreement is a written document, but the steps used to get there are often not documented on a day-to-day basis.

Because time on a proposal is short and deadlines are unforgiving, it might be worth defining deliverables for each of these areas so that participants can report out at scrums and the team as a whole can sense that progress is being made. Virtually any task that contributes to the proposal can be documented in some kind of deliverable: a checklist of teaming partners, a matrix showing the strengths and weaknesses of competitors, or a pricing spreadsheet that compares rates across companies.

A focus on working code within the agile community was a move toward simplification in reaction to the demands for many other types of documentation. For this reason, agile project plans are often simple white board displays populated by sticky notes, as illustrated in Figure 1.

In the proposal world, similarly, particularly in large bureaucracies, documentation demands can be onerous. Capture plans, proposal plans, storyboard forms, progress reports, budget reports, and gate reviews all compete for time in the day with the creation of material that will go into the proposal itself. An agile approach suggests that participants respect the need for collateral documentation while placing a priority on the proposal text.

Burndown Charts

A fifth technique is the use of a burndown chart. In software development, the burndown chart shows how many chunks or stories have yet to be finished before the end of the sprint or iteration. Proposal managers typically use scheduling tools such as Microsoft Project, which show the status of all proposal tasks rather than the relationship between work to be completed and hours/days remaining prior to proposal submittal. A burndown chart can take many forms, and can even be created on the proposal wall in real time as work is completed. There are commercial software vendors that sell burndown chart templates for those who want more sophistication.

The burndown chart should be visible to the entire team. Like the scrum, it promotes accountability and clear communication. In the software world, testing is built into story completion, so when a unit of work is designated as complete, it is proven, working code. Burndown is therefore a significant measure of progress. In a proposal environment, by contrast, individual pages and proposal sections often cannot be tested on a daily basis, so burndown charts are likely to be more quantitative than qualitative. Still, they can be useful for tracking storyboard completion, staffing, and past performance.

Burndown charts will be helpful in a proposal environment only if they track major proposal deliverables, such as volumes or sections, during discrete phases. Too much detail will detract from clarity and from a sense of urgency. The two critical components to the chart are units of work and time remaining until a deadline. The burndown charts in Figure 2 indicate the number of hours until pens down plotted against the list of proposal sections and the number of days remaining before proposal submission plotted against the number of subcontractor proposals received.

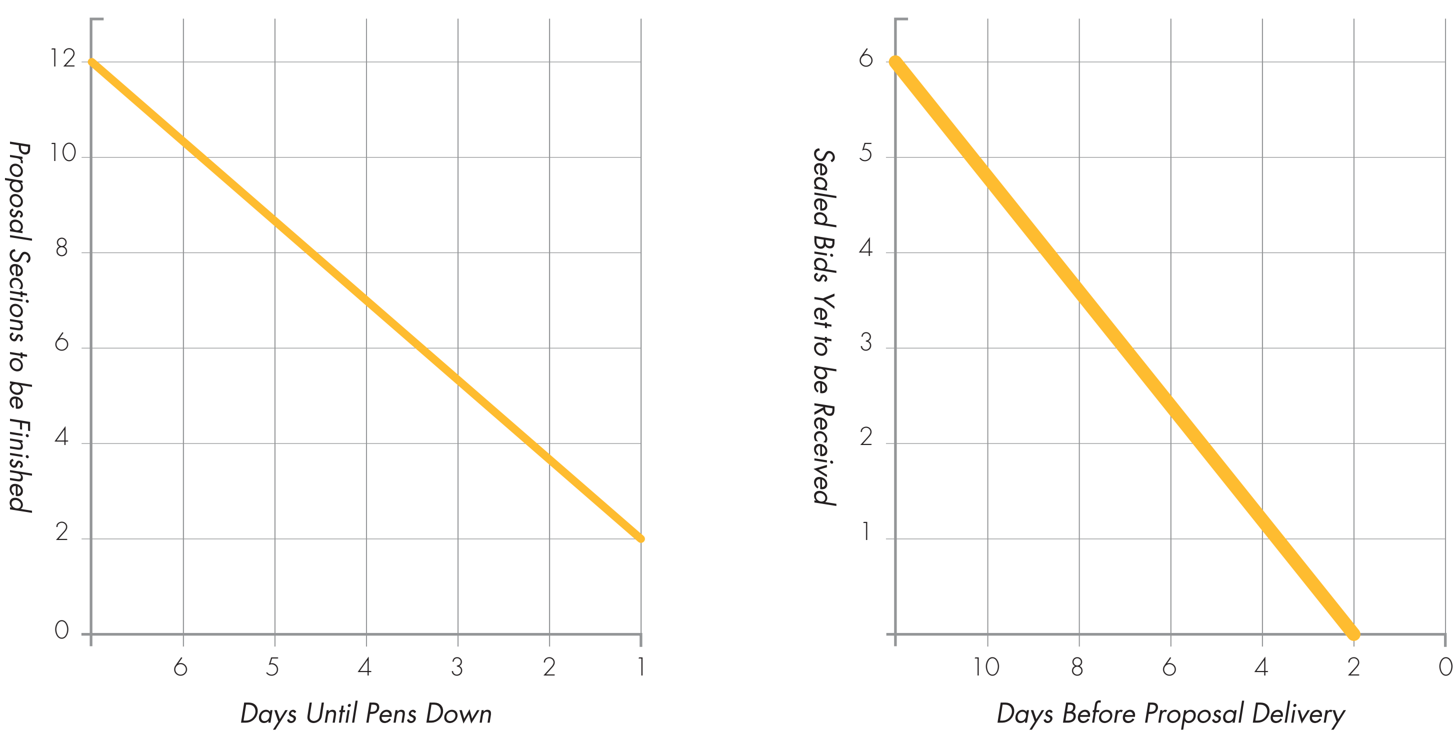
A number of other agile features have already been adopted with success by proposal managers: the use of cross-disciplinary teams, the co-location of all contributors in one proposal or war room, the use of color reviews (the virtual equivalent of the software certification and acceptance tests), and the value of easily accessible food and drinks (to keep people in the room).

Common Environments, Common Approaches

The fact that these two disciplines have already established common approaches is indicative of the common challenges. Development teams face intense deadline pressure, and completion of interdependent tasks mandates close communication. Like proposal teams, they work together in large, open spaces where communication is informal and frequent. An accessible supply of snacks and cold drinks features prominently in agile software organizations. Development teams are cross-disciplinary and are formed without regard to the organizational hierarchy, as are most proposal teams.

Proposal managers and software developers both cope with change on a daily, sometimes hourly basis. Agile software development processes embrace change. Because iterations are short, developers stay focused on a few high-priority items. They test and release code, get feedback quickly, and can respond adaptively to changing requirements in a subsequent

Figure 2: The Burndown Chart Adapted for the Proposal Environment. Burndown charts emphasize the relationship between the time remaining and the work remaining.



iteration. The fact that requirements are dynamic is assumed, and the process is built to accommodate them. This contrasts with traditional software development approaches where requirements are locked down early and a change control boards approve any departure from the plan.

The proposal environment likewise demands response to frequent changes: amendments are issued, companies are bought and sold, customer organizations undergo personnel changes, and other events that cannot be controlled by the proposal team wreak havoc with the proposal schedule and logistics. Agility and flexibility are prerequisites for a successful proposal manager in the current government procurement environment.

Finally, in an agile environment, deadlines are firm. This contrasts with a traditional software development approach where deadlines and budgets are extended to accommodate an increasing scope. As new features are added or requirements are changed, the budget and schedule expand. Scope creep is one reason for the costly delays in large software programs. In an agile environment, by contrast, as shown in Figure 3, the time and budget available remain fixed, and the scope is adjusted accordingly.

Instead of developing all the features, teams are forced for schedule and budget reasons to focus on the high-priority ones—the all-important 20 percent—in the ongoing iteration rather than the "rarely to never used" 64 percent. Here the parallel is obvious: respect for deadlines is inherent in a well-managed proposal, and deadlines drive the pace and structure of most proposal activity.

Where to Get More Information and Training on Agile Processes

The agile universe is large. Some established Websites and organizations have the sole purpose of promoting a particular tool, certification, or methodology; others are more scholarly and focused on empirical research. The following list is only a small sample of what is available:

- Agile Alliance: (http://www.agilealliance.org)
- Scrum Alliance, the Web site for Certified Scrum-Masters: (http://www.scrumalliance.org)
- Agile Project Leadership Network (APLN), DC Chapter: (http://aplndc.pbwiki.com)
- The Original Manifesto: (http://agilemanifesto.org/history.html)
- Control Chaos: (http://www.controlchaos.com).

Conclusion

The deadline-driven, fast-paced dynamic environment that characterizes agile software development shares many features with a proposal war room. Because agile teams have been in existence for more than five years, and because of the size and risk of most large software development projects, sophisticated tools now exist to implement and reinforce agile concepts. TargetProcess, VersionOne, Electric Cloud, and MSF for Agile Software Development are among the better known, but there are many others. Pro-

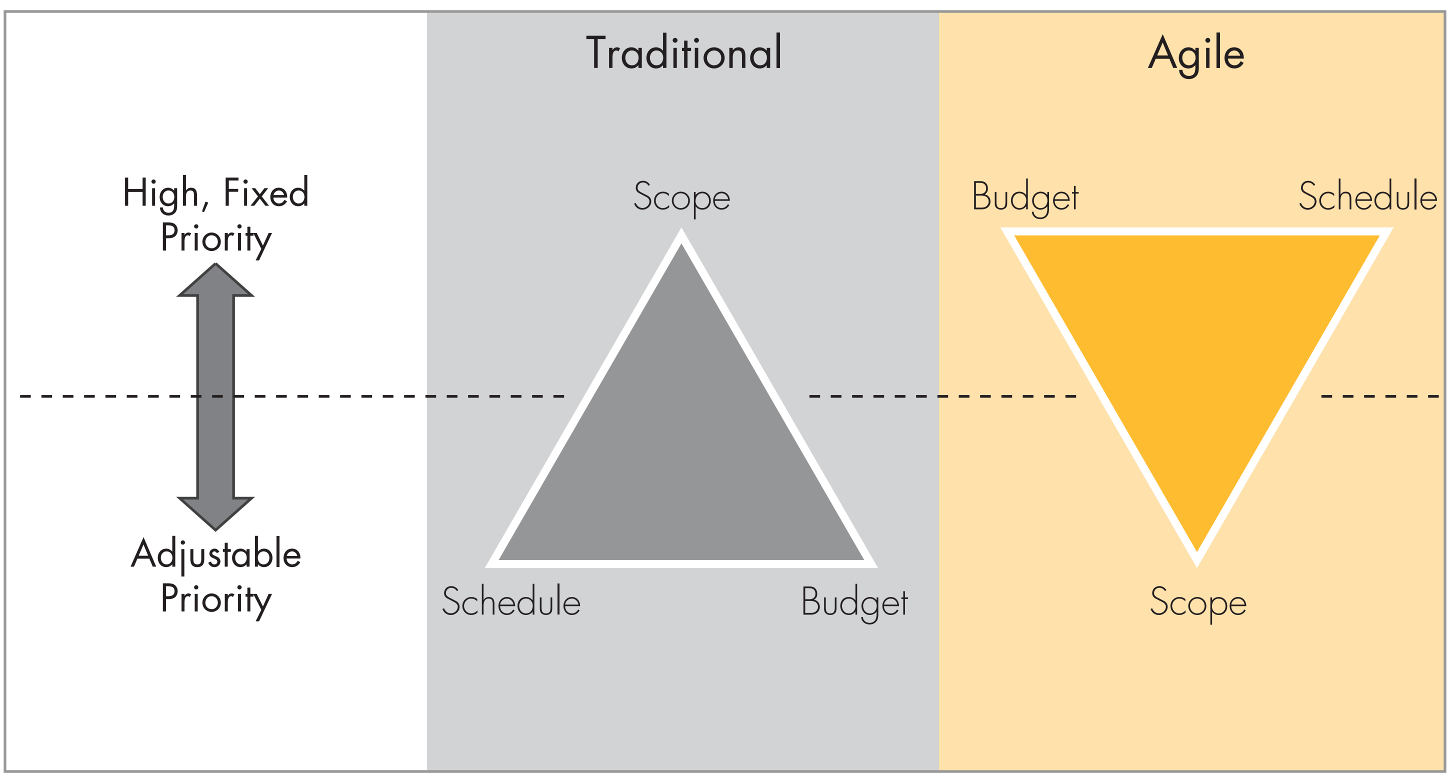


Figure 3: Traditional "Waterfall" and Agile Methods Compared. Waterfall and agile methods differ in their approach to cost, schedule, and scope.

posal managers can learn a great deal from studying these tools and approaches, with particular emphasis on scrums, chunking, establishing priorities, working code, and burndown charts.

These tools were developed to respond to many of the same pressures that proposal managers and proposal teams face every day. Each represents an approach that many proposal managers *might* take based on intuition; they can be much more effectively adopted—and adapted—if they are used deliberately and consciously, based on principles that have been tested in populations much larger than those of proposal teams.

Is agile project management the silver bullet for all proposal managers? Is it the latest fad that will go the way of Total Quality Management and many others? The answer to both questions is no. Agile methods cannot be imported as is into the proposal environment for reasons explained in this article.

But specific agile tools can force proposal managers to be more conscious of and more disciplined about what they do already based on intuition and experience. They can increase accountability and improve communication, productivity, and team morale. For those who have experienced proposals as a group of people running around with their hair on fire, while eating takeout food at 3:00 a.m., these are attributes much to be sought after. They will help the continuing transformation of the profession into a serious discipline that can be used to achieve excellence and business success.

My thanks to Dave Lemen and Clay Brown for comments and suggestions on the initial draft of this article. The views expressed in this article are my own and should not be attributed to them or to my employer, CSC.

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Highlights of Benchmarks

World-Class Proposal Writing Capability Research Study

Charlie Divine, PPF.APMP and Vicki Griesinger

1.0 Introduction and Summary

In December 2007, the Business Development Institute International (BD-Institute) partnered with BAE Systems Electronics and Integrated Systems Operating Group (E&IS OG) to undertake a broad research project in the area of proposal development. This article describes the study methodology and 10 of the major findings of the study. In all, the study found more than 180 benchmarks in world-class proposal writing.

In undertaking this endeavor, we recognized that accurately benchmarking "proposal writing capability" requires sound research design and substantial depth of understanding of both primary and secondary contributors to what constitutes "world-class" performance.

- Even the most comprehensive studies have made questionable assumptions about how to select organizations to be benchmarked.
- In general, benchmarking to date has not done a good job of demonstrating any correlation between specific attributes that contribute to success and actual results.
- There has not been significant discrimination of enabling conditions that must be present for the benchmark characteristics to be relevant.
- The primary focus on past efforts has not been on defining benchmarks in a way that suggests how results can be repeated.

1.1 The Issue of Standards

> **"Success in BD pursuits depends on many factors outside the organization's proposal writing capability."**

The most fundamental issue for the project was how to select the organizations to be studied. Most studies to date have selected participants either based on the anecdotal analysis of the sponsoring company or on criteria outside the actual BD domain—e.g., return on investment or win rate. Of course, the reality is that success in BD pursuits depends on many factors outside the organization's proposal writing capability, including customer relationship, political considerations, market segmentation, business strategy, opportunity selection, and so forth. Accordingly, we designed a study methodology that focused on more discrete factors and provided a way to discriminate primary versus secondary causes for success.

The Business Development - Capability Maturity Model (BD-CMM)* provided a robust standard and framework of how to understand capabilities within the Business Development continuum. This more discrete view allowed us to see individual tasks and practices that build up to "proposal writing capability" in terms of component parts with defined interactions and dependencies. Accordingly, we recruited participating organizations based on criteria directly related to the areas of interest.

* Capability Maturity Model and CMM are registered in the US Patent and Trademark Offices by Carnegie Mellon University.

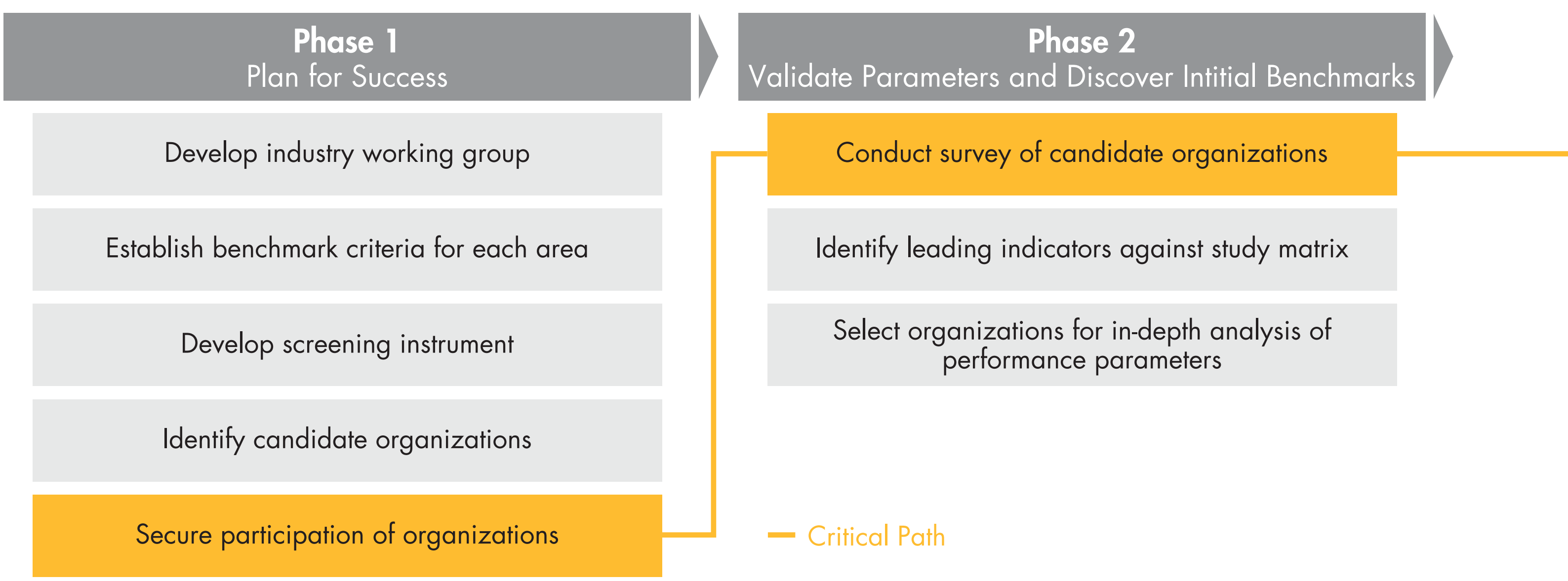


Figure 1: *Study Methodology.* The BD-Institute methodology uses four phases by which to complete the benchmark study. Critical-path activities are highlighted in yellow.

1.2 The Complexity of Context

A second issue that needed to be clearly understood had to do with the fundamental "dynamics of BD best practice." That is, BD practices work in combination, and their interactions and interdependencies are essential for success. For example:

- Some process steps do not work unless adequate funding, training, and staff support is provided, while others are predicated on strong, engaged senior leadership.
- Practices established at each company may be a function of the financial perspective on B&P. Simply put, is B&P viewed as a cost or an investment?

It was important to recognize these dynamics, and not simply diagnose a list or frequency of practices. Otherwise, the study would have provided data without the understanding needed to guide application and improvement.

1.3 The Reality of Variation

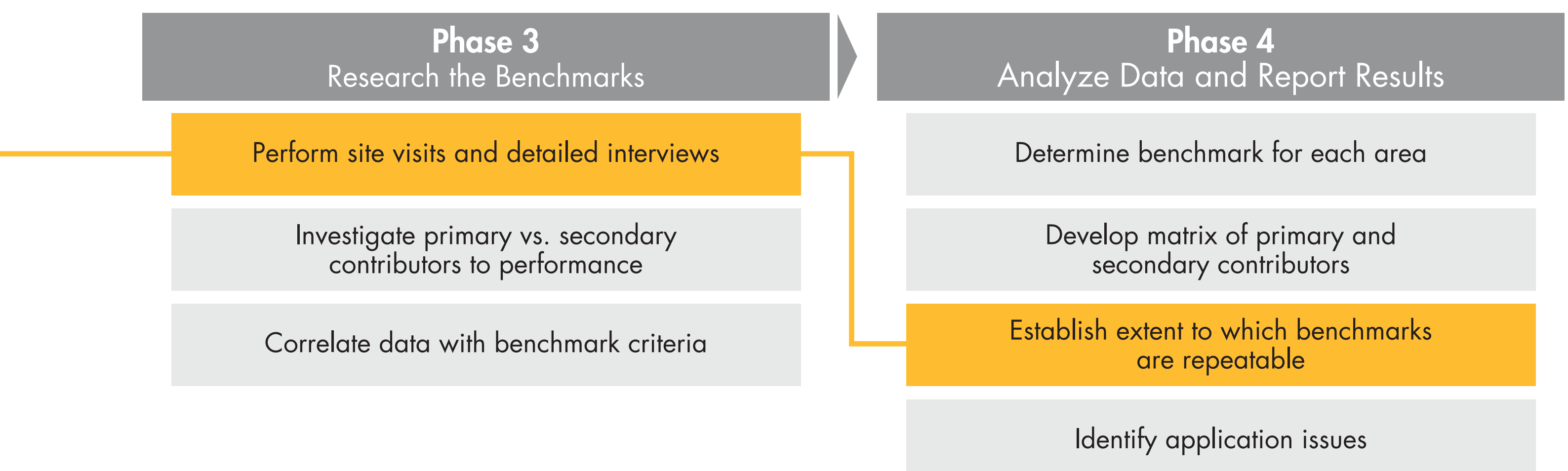
A third issue that had to be clearly understood in conducting the study related to what might be called "situational variation." Proposals vary in size, scope, and complexity—even within the defense and aerospace market. In fact, no business unit within any given company can be described as having a single proposal typology. What is more, customer procurement vehicles, buying processes, and priorities also vary. Indeed, a key performance indicator was how organizations assess individual proposal situations and tailor practices to meet the needs of individual proposals. The decision to apply specific practices should consider the scale, scope, complexity, and risk of the proposal effort.

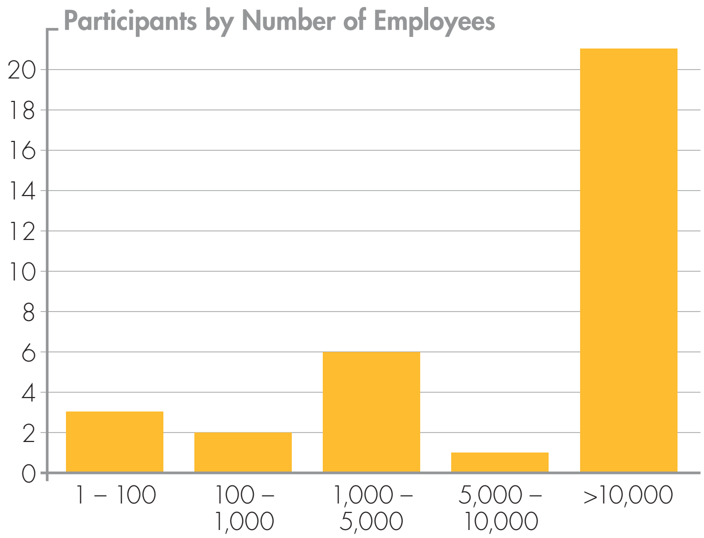
1.4 The Dilemma of Actionable Findings

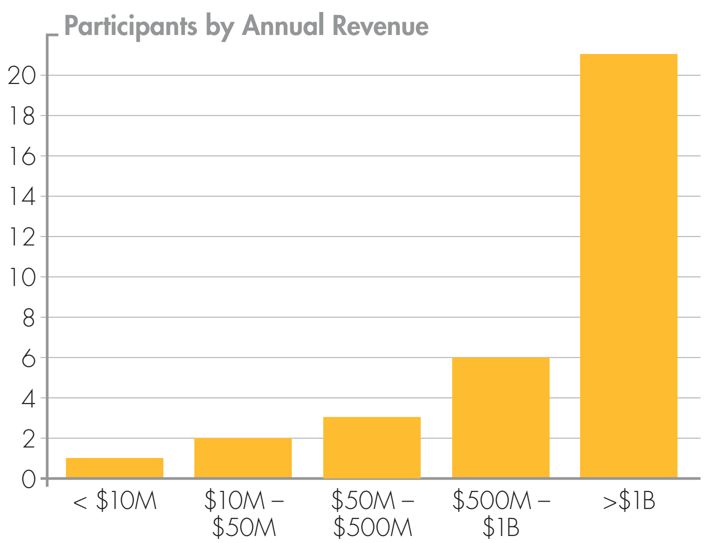
Finally, and in some ways most importantly, the benchmark study must address the all-too-common tendency for such efforts to identify interesting practices, trends, and possible correlations without determining what is actionable in a different environment.

At the center of this issue was the question, how do benchmarks need to be described and understood to be repeatable in different business contexts? Again, the perspective of the BD-CMM was particularly insightful; that is, it allowed us to define what "world class" organizations do in terms of both the specific practices performed and the set of organizational conditions that made that performance possible—for example:

- The level of management commitment required
- How much resource was needed to enable desired organizational behaviors
- The level of training, expertise, and experience needed by practitioners to be effective and efficient
- What the organization did to manage and measure performance, as well as to verify consistent compliance.







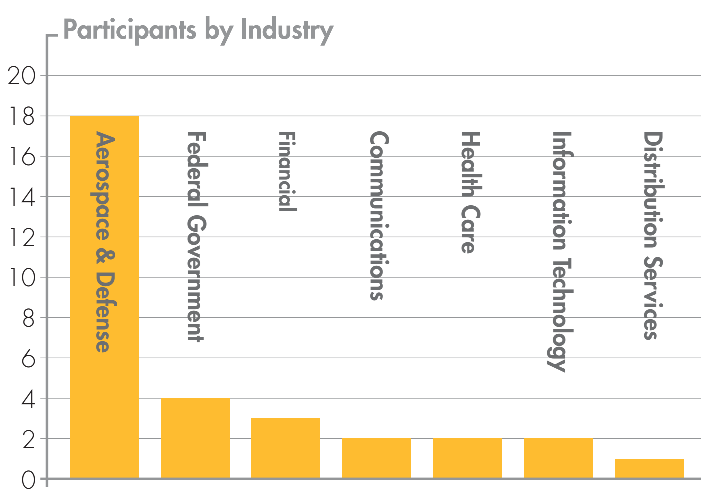


Figure 2: *Participating Companies*. The companies that participated in the benchmark study were predominantly large aerospace and defense organizations with complex structures, but the sampling also included small, medium, and large companies from other industries.

2.0 Research Methodology and Approach

Fundamentally, the methodology for this research project was intended to allow us to get beyond "false benchmarks." That is, we consciously sought to be able to isolate attributes that directly correlate with what happens during the proposal development portion of an organization's BD process.

2.1 Phased Approach

The BD-Institute believed that the best way to achieve study goals was to adhere to the following design, as illustrated in Figure 1 (page 52):

- Plan the project based on a study matrix that isolates individual areas to be benchmarked, rather than assuming that "high-performing" organizations can be pre-determined by secondary criteria
- Conduct an initial phase of study by which to screen candidate organizations against the study matrix to validate individual areas to be benchmarked and to establish measurement baselines
- Perform in-depth analysis within selected organizations based on performance in each area of the study matrix—e.g., process steps, use of automation, organizational constructs, training model, etc.
- Report "world-class performance" in terms of the individual areas, including consideration of secondary contributors or enabling conditions associated with the area—i.e., BD-CMM level view focused on actionable outcomes.

2.2 Participating Companies

Once we had a full set of candidate companies (see Figure 2), the task was to screen them for relevant performance indicators using the benchmark criteria developed earlier. The goal was to validate that they did indeed offer prospective benchmark-level performance in the areas of interest. This was done by telephone through screening interviews, organized against the study matrix prepared during Phase 1. Through this process, we were able to verify that all the study parameters could be addressed, as well as to discover to what extent each candidate would be able to demonstrate "world-class" capability in specific areas.

In working this initial data gathering against the study matrix, we focused on characteristics that were directly attributable to targeted aspects of proposal writing capability. Moreover, we established a process to decide which organizations should be studied in more detail and in which areas.

To actually determine "world-class" performance in each area required on-site work with each organization selected for further study. Accordingly, the study group was reduced to 23 organizations (see Figure 3), each having at least one area of benchmark-level performance that contributed to overall results that were well above industry averages. It was also informative to observe the extent to which such organizations showed overall characteristics within their BD operation that aligned with defined key practices of the BD-CMM.

2.2 Approach to Study Areas

In targeting to identify, understand, and work toward an "ideal end state" in terms of "best-in-class proposal writing processes and tools," the study set a high mark for the level of performance to be identified.

Our approach relied heavily on the working group to provide "expert witnesses" in each of five designated study areas, through which to select a robust set of candidate organizations from which to derive actionable improvements based on an "ideal end state." The goal was to identify the "best-of-the-best" in each area.

2.2.1 Benchmarking Proposal Development Steps

In looking for benchmarks in the area of proposal development steps, we needed to access several perspectives. We realized that there were alternatives that could result in equally high or higher performance for given steps. For example, both the Shipley approach to storyboarding and the SM&A model of story mapping are well known and broadly adapted within Industry. Our brand independent approach gave us the opportunity to find organizations that perform this process step in a world-class way.

Our approach included numerous industry suppliers in the working group, and they nominated organizations that they felt perform at the highest level, using their respective methods, tools, and processes. We also sought their input into the study matrices in terms of what criteria should be used to measure performance and how best to understand primary and secondary contributors to success.

2.2.2 Benchmarking Automation Tools

To benchmark use of automation tools, we leveraged relationships with several BD automation providers, as well as involving Corporate Members who have had major initiatives in this area. This allowed us to define criteria for measuring effective use of automation tools within a proposal process, and we were able to get ready access to organizations that have reported significant benefit from their use of automation.

Notably, this was an area of interest for which we found it especially important to consider organizations outside of the Aerospace and Defense industries, as we had observed more innovation in the Information Technology and Telecommunications sectors in this particular area.

Of particular interest in terms of automation, we believed that parameters such as cost/benefit ratio and return-on-investment should be considered in determining benchmarks in terms of automation. We also recognized that certain kinds of automation—e.g., virtual working environments—could be more important for some business sectors than others.

2.2.3 Benchmarking Organizational Constructs

This proved to be one of the more dynamic areas of interest, as the issue of internal proposal development organization models versus outsourcing models offers a wide range of variation. To address this area effectively, we were especially interested in iden-

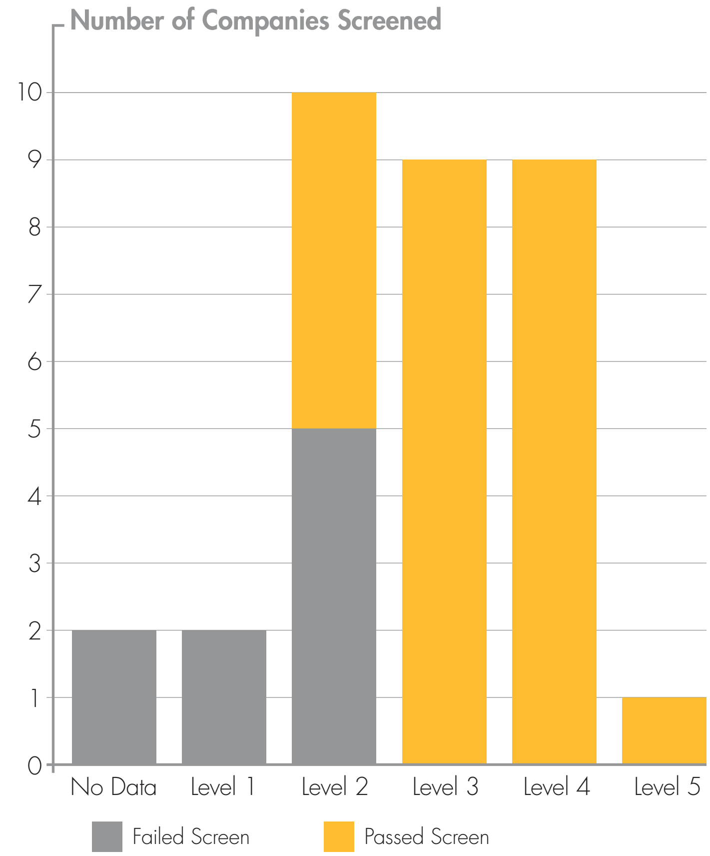


Figure 3: *Maturity of Participating Companies.* The companies that survived the initial screening proved to be more mature in their Business Development Capability, based on a BD-CMM self-assessment.

"Our brand independent approach gave us the opportunity to find organizations that (benchmark proposal development) in a world-class way."

"Clear directions on responsibilities, reviews, and process steps are specified avoiding the tendency to reinvent the wheel for each new opportunity."

tifying organizations that had outsourced their proposal writing capability to consulting firms, as well as access organizations that routinely use the more common proposal team augmentation approach.

Given the range of variation in this area, we needed to clarify specific values to be included in the study matrix. It was also important that we not overlook existing literature, as there are ongoing discussions in this area sponsored by the Association of Proposal Management Professionals (APMP).

2.2.4 Benchmarking Training Approaches

In terms of understanding the contribution of proposal-related training to benchmark-level success, we benefited significantly from the extent to which industry consultants has worked with aerospace and defense companies to create broad, customized training programs. We noted more than one instance of where these consultants had worked with major aerospace and defense corporations to define and deploy corporate-wide training strategies that were included in the study.

Some of the items that were considered include:

- Relative performance of competency-based training approaches versus general training
- Possible performance advantages of training cadres of specialists versus undifferentiated training audiences
- Possible gains in efficiency due to creating a learning environment for proposal participants—i.e., integrating a multi-faceted training approach with an electronic resource infrastructure.

In addressing these and other considerations, we again drew upon our Industry contacts. We wanted to consider how various training systems have been deployed.

2.2.5 Benchmarking Other Factors Affecting Performance

Although the miscellaneous area of interest had the least definition among the areas to be benchmarked, we believed that this was one of the most productive in terms of understanding what performance levels are possible and what is required to achieve them. Accordingly, we considered such other factors as incentives, leadership roles and behaviors, how financing and resource allocations are made, the role of process management in addressing internal impediments, etc.

We also considered factors that trigger or motivate dramatic improvements or transformations in proposal writing capabilities. Thus, we considered it important to identify the conditions that encouraged, or at least supported, such improvement. Factors we evaluated included:

- Primary weaknesses underlying dramatic improvements
- Critical success factors for overcoming primary weaknesses
- Seminal events that motivated or helped the benchmarked organizations take proposal writing to the next level and/or break free of recurrent bad habits; examples of such events might be a major loss, a strategic hire, or the arrival of new proposal center leadership.

In this way, we believed that we could define a model, or models, to help break out of typical patterns of developing processes that are not followed, knowing what to do but not doing it, and training people to work proposals a particular way but not getting management support for doing so.

3.0 Highlights of the Research Study

The following list represents 10 top benchmark practices that directly relate to success in the proposal-writing phase.

“...a proposal planning framework tool promotes good proposal planning and guides contributors to the proper strategies and win themes.”

3.1 Use a Business Development Process Guide

Best-performing organizations that were studied use a BD Process Guide. Their overall process is documented, followed, and institutionalized from beginning to end. The Process Guide details the processes and policies associated the organization's business development process. This is a policy-level document and is key to establishing and maintaining consistency in the proposal process. It is institutionalized by appropriate management commitment and active verification.

Medium and small organizations apply these practices by downsizing the scope of the process guide and proposal plans. Clear directions on responsibilities, reviews, and process steps are specified avoiding the tendency to reinvent the wheel for each new opportunity.

3.2 Use a Proposal Plan for Major Pursuits

The benchmark study revealed that a significant finding was the consistent use of an actively maintained proposal plan based on the capture plan. Mature companies developed individual proposal plans, based on the capture plan, that specify:

- Customer details*
- Results from competitive analysis*
- Proposal strategies and themes
- Staffing plan
- Responsibilities matrix
- Draft Executive Summary
- Proposal outline
- Facility plans
- Budget
- Management perspectives
- Schedule for reviews and milestones
- Tailored tools and templates
- Other proposal related items as dictated by the procurement type
- Facility plans.

Web and online repositories enable distribution and real-time updates of proposal plan information. Sample proposal plan templates and Web repositories ease the creation of proposal plans and encourage their use on more routine bids.

3.3 Use a Proposal Planning Framework Tool

The benchmark study showed that an important finding was vigorous use of a proposal planning framework tool, such as storyboards, annotated outlines, or proposal maps. Effective organizations institutionalized their framework processes. The use of a proposal planning framework tool promotes good proposal planning and guides contributors to the proper strategies and win themes.

Prerequisites for successful use of framework tools include adequate time, effective training, active coaching, sufficient staffing and leadership commitment, frameworks properly tailored to the opportunity, and advance work by the core team to populate key information relative to the opportunity. The study also revealed that storyboards predominated in collocated environments, while online tools were used for framework capability in virtual environments.

3.4 Provide Collaborative Environments

The findings for this research area reveal that success with automated tools depends greatly on how well the tools are adopted across the institution of the company. Further, the use of automated tools must embrace the proposal process guide and proposal plan. It is how these practices in proposal automation are

*Carried over from capture plan

managed, measured, and institutionalized that is most important. Many organizations have methods in place to ensure that these enabling processes are consistently carried out. Effective use displayed these characteristics:

- The automated tool and proposal process are closely aligned
- Management-supported universal use of the tool
- Management-provided sufficient funding for training and support of the tool
- Team members integrated the tool into daily conduct of the proposal process
- Leadership visibly used the tool
- Aligned tools and templates institutionalized key practices.

Success is highly dependent on how organizations establish using the tool as a routine practice. This again confirms the importance of the company's commitment to perform, ability to perform, choice of activities performed, monitoring, and validating of proper use.

3.5 Aggressive Use of Knowledge Management Systems

The benchmark study revealed that an important finding for Knowledge Management Systems was use of a successful plan for knowledge management executed by staff whose sole responsibility is knowledge management.

Effective organizations use knowledge management aggressively, to the extent that it is appropriate to content for the specific proposal. They also parse information into discrete bits and use structured writing for ease of reuse for other opportunities. Factors to be considered for knowledge management include:

- How often the same product or service is offered
- Past performance in specific environments
- How much digital storage space is available and easily accessible
- How easily content can be tailored for responses that match customer's issues.

3.6 Use Professional Writers

The benchmark study revealed that a significant finding was employing professional writers to create layering of complex information that is essential to understanding by all levels of evaluators. Mature organizations recognize professional writers as an essential part of creating compelling, well-comprehended proposals.

- Professional writers are an essential part of creating compelling, well-understood proposals.
- Leverage role of professional writer to go well past editing for grammar and syntax.
- Layer complex information to create essential understanding for all levels of evaluators.
- Use structured information collection designed by professional writers to help the technical experts provide in-depth information for compelling content.
- Use professional writers to enforce standards of persuasion in drafting and finalizing the response.

3.7 Use Controls to Verify Brand Positioning

The benchmark study showed that an important finding was emphasizing consistent corporate branding as an essential part of affecting the market's perception of the value of company offerings. It is equally important to move from simple branding of products and services to focus on branding perceptions of the company's relationships with customers.

- Emphasize consistent corporate branding as an important part of creating and improving the market's perception of the value of company offerings.

- Make corporate-level commitments to position and improve the company's brand. (This is especially true for companies in the aerospace and defense industries.)
- Carefully control positioning to establish and grow brand identity.

3.8 Allocating Resources in the Process

The benchmark study revealed that an important finding was reviewing the capture plan for anticipated scope and timing of proposal team requirements. The proposal plan updates the capture plan view to include tentative assignments, update sizing, and identify the required budget and schedule. Identify and staff a core team in the pre-proposal phase. The core team prepares the proposal framework for full proposal team before full staffing.

3.9 Use Physical (Collocated Facilities or Virtual Facilities

Benchmark Finding–Physical Facilities

The leading organizations that were identified in this aspect of the research use the following practices:

- Create the necessary foundations and rationale for collocated proposal physical facilities and securing advocacy from upper management.
- Provide separate work areas tailored to specific proposal functions; and the facilities encourage camaraderie, communications, and networking, as well as perceived value of proposal team.

Benchmark Finding–Virtual Facilities

The benchmark study demonstrated that an important finding for virtual facilities was making scalable, tailorable process a high priority of vital importance for virtual facilities; using this approach, any functions of a collated facility can be replicated in the virtual environment. It is especially notable that the organizations that excelled at writing successful proposals in a virtual environment were those companies that were themselves virtual organizations.

3.10 Understanding Depth and Level of Proposal Writing Training

The benchmark study revealed that an important finding for proposal writing training was to use four levels of training (leadership post-graduate, professional undergraduate, core team, and other contributors). Effective organizations provide training for:

- Proposal and Business Development Group leadership at an in-depth post-graduate level
- The proposal team and business development team at professional undergraduate level
- Core team and contributors and SMEs at less intense levels
- Review team members in specific areas pertinent to management reviews.

About the BD-Institute

The Business Development Institute International (BD-Institute) is a non-profit organization, dedicated to promoting business development (BD) excellence. Our mission is to create and sustain the world's premier community of practice in business development and to provide independent thought leadership and innovation in BD practices by:

- Making BD capability and maturity a priority for both Business and Government
- Maintaining the BD-CMM as industry's standard for how to achieve maturity in BD capability and be a leader in BD results
- Becoming industry's preferred source for measuring BD capability and setting the path toward innovation and organizational transformation
- Bringing together diverse BD functions and specialties to identify and articulate BD best practices and benchmarks across industry
- Advocating the role of BD professionals in driving sustainable growth and profitability for companies, as well as increased value and reduced risk to customers

The complete results of the study are available on the Business Development Institute Website, **www.bd-institute.org**

About the Authors:

Charlie Divine, PPF.APMP works with the BD-Institute as the Director of Research and Knowledge Management. The BD-Institute has established a business development community of practice involving BD professionals, professional societies, and academia. Mr. Divine was the Principle Investigator for the Proposal Writing Benchmark research study. He led the development of the BD-Knowledgebase™ for APMP and the BD-Institute. He is a certified BD-CMM Appraiser and an APMP Fellow. He Volunteers as the Director of Education for APMP, and recently led the 2008 Salary Survey for APMP. Charlie refired from ATT in 2000, where he directed all their pursuit and proposal centers.

Vicki Griesinger is the Director of Operations of the Business Development Institute International and a certified BD-CMM Appraiser. She was a former APMP Board member and past CEO of APMP. She is a member of the Association of Strategic Planning (ASP), the Society of Competitive Intelligence Professionals (SCIP), the National Contract Management Association, the Society for Business Development Professionals (SBDP), and the American Society of Association Executives (ASAE).

Getting in the Winner's Circle
– Creating Winning Proposals, 2nd edition,

September 2008, R.N. Close Associates, Inc./Jay Herther
$49.95 paperback.

Available at www.lulu.com (Search for "Dick Close")

Email Herther3@comcast.net for high volume discounts, "Selected Vugraphs" and two entertaining and informative Training Videos available.

by: **Betsy Blakney**, APM.APMP

Like any winning proposal or persuasive presentation, *Getting in the Winner's Circle*, begins with a summary of its Seven Steps to Winning. Designed with a double-column format throughout, the layout handles the 136 integrated graphics with ease. Besides this enhanced readability feature, what sets this textbook apart from other reference manuals is its focus on tips for success, 546 to be exact, rather than detailing the steps it takes to get a "winner" out the door.

Seasoned proposal professionals will recognize this book as the revision to Dick Close's best seller, *Winning Proposals in the Nineties – 546 Tips for Winning Extra Point Score and Saving Proposal Dollars* (First Printing, January 1991). The first printing sold out for $89 per copy in the early 1990s. In this updated version, the wit and wisdom of Close's 45 years in the business still captivates. His Proposal Win Strategy seminar/workshop has been presented more than 450 times to more than 15,000 people. When given to proposal teams, the workshop has produced an enviable 83 percent win ratio.

Since I transitioned into the profession during the late 1990s, I missed the opportunity to attend one of Close's Proposal Win Strategy seminar/workshops and never crossed paths with this pioneer and guru who taught the art and science of proposals. Yet, I was inspired to read this book and also purchase the first edition for comparison to learn from this industry thought leader.

The book is organized into four parts aligned to the business development lifecycle.

Part I—Preparing for the Winning Proposal sets the stage for disciplined capture planning. The takeaways peppered throughout Chapters 1-5 offer practical advice for laying the foundation for smart bid/no bid decision-making. The last three chapters describe what Close refers to as "The Nine Keys to Success." Many of the messages conveyed in Part I resonated as I have used them repeatedly in my own training materials over the years. Might they have originated with Dick Close, I wondered. Here are some you will no doubt recognize:

- The Program is Not Real Unless – Funds are in the Budget.
- You can't simply win by writing a good proposal. However, you can certainly lose by writing a poor one.
- …get out of your shell and look at things from your customer's perspective.... The only thing that counts is what the evaluators think…!
- Don't Just Sell – LISTEN!
- Form the Core Proposal Team Early
- Request a Debriefing – Win or Lose!

Part I reinforces the development of a win strategy strengthened by frequent interactions between you and your customer to continually refine a solution (to the real problem) tailored to their wants and needs (hot buttons).

Part II—Tips for Writing the Winning Proposal. Advance preparation is the hallmark of this section. In six chapters, Close offers sage advice on the value of storyboarding first before writing, following an approved outline aligned with the RFP instructions and requirements, and making your proposal easier for the evaluators to read by incorporating modularity in the formatting and using impact graphics. The last three chapters focus on writing tips, developing good theme sentences, and curing writer's paralysis.

The concept of assembling and completing a database prior to writing reinforces the need to understand what the customer's problem is, explore all solutions that you and/or your competitors are likely to propose, identify what gaps exist in your solution by conducting tradeoff analyses (described in detail in Part III, Chapter 13), and develop discriminators to set yourself apart from the competition. The database elements are then presented in a storyboard for review and approval.

Part III—Tips for Managing the Winning Proposal. Herein lies the "soul of a good proposal"—tradeoffs. According to Close, using tradeoffs to win is an essential element of crafting an excellent response. Placement of the tradeoff is also critical. Weaving them throughout the technical and management proposals leads to well written and well substantiated messages.

While many of the examples given in Chapter 14—Technical Proposal Content Tips—are specific to the system engineering field and/or IR&D projects, there is plenty of sound advice relevant to all product and service offerings. Topics such as pros and cons of using alternate proposals, handling impossible RFP requirements, knowing when to take risks but not exceptions to the RFP, and summarizing your solution right up front are worth digesting so you "don't stick the knife in yourself."

> *"A primary aim of your preproposal effort should be to bring the customer's thinking toward yours and your thinking toward his (called 'convergence') to establish a common perception of the problem and the solution."*

Chapters 15—Management Proposal Content Tips and 16—Specialty Section Content Tips explain ways in which you can achieve excellence in your proposals. Making effective use of graphics, tailoring your related past experience, and customizing resumes are recommendations found here. However, the chapter that really delivers is the Specialty Section, which focuses on tips for developing quality assurance plans, subcontracting plans, and risk management plans—areas where Close says we should not skimp. To the contrary, "Going for the Gold" in each of these sections will help score more points and bring you closer to winning.

Chapter 17—Cost Proposal Content Tips provides common sense guidance (e.g., justify costs fully, provide good traceability, etc.) on how to produce a credible and winning cost proposal. This chapter is supplemented later in the book by Chapter 33—Cost Proposal Management Tips. Together, they form the basis for submitting a superior cost proposal.

Rounding out Part II is a chapter on Executive Summary Tips and some final reminders. Halfway through the book, these chapters reinforce what you have now learned and queries whether you have done all the things you needed to do to make your proposal stand out.

Part IV—Tips for Managing the Winning Proposal. The fourth part of this book assumes the reader has a working knowledge of the proposal development process. Woven with tips throughout, the 16 chapters focus on what it takes to create a winning proposal. Topics not usually covered in depth in other proposal texts that I found most helpful included: teaming tips, pacing your effort, and competitive thrust tips. Justification for taking a "top-down-structure" approach for your proposal will bring smiles to those proposal professionals who believe that the executive summary should be storyboarded and written first.

Advice contained here is meant to help a company streamline its operations to reduce bid and proposal costs and to provide the means to maintain one's sanity in a sometimes chaotic proposal development environment. Following tips regarding proposal management organization, achieving responsiveness, meeting management, and review management will benefit proposal practitioners.

I believe the reader will find value in the text as a reference guide as long as you can apply the specific examples provided to your everyday situation. Also, the comprehensive topical index makes information easy to find and reference.

While the 27 comprehensive check lists in the appendix are very useful, the second appendix, Types of Government Procurement, is limited in its coverage of a complex process. Keep in mind though that the intent here is to focus on R&D and systems acquisition.

You will find this book a practical guide. Although some of the graphics should be updated in the next edition, there is something in here for everyone. This book is a small investment to get you and your team into the Winner's Circle! I applaud APMP Fellow Jay Herther for bringing this timeless classic back into the limelight. It stands on its own as a proposal management body of knowledge, and fulfills its promise to get you closer to creating and submitting superior proposals.

Winning Tips:

- Put your mind in gear before your pencil!
- Good themes contain critical information – not sales slogans.
- Use first person, active voice.
- Start sections in past tense – tell them what you have already done!
- Use the "Rule of Six" - the mind can't absorb more than six items on a graphic at one time.
- Address all RFP requirements using headings and organization that will permit the evaluators to find the answers for their score sheets easily.

Betsy Blakney, APM.APMP, has 13 years' proposal development experience and is Director of Proposal Services for UNITECH. Betsy is also the Books Editor for the *Journal of the Association of Proposal Management Professionals* and serves on the APMP Board of Directors as Secretary. She can be contacted at betsy.blakney@apmp.org.

GunnSights: Taking Aim on Selling in the High-Stakes Industry of International Aerospace

Tom Gunn

Naval Institute Press, 2008; $29.95

by: **Bruce Morton**

This book is really fun to read. It contains lots of stories, strategies, approaches, processes, and experiences, and it discusses the specific results related to commercial and military aircraft sales in both domestic and international markets.

The book is written from a McDonnell Douglas (and subsequently Boeing) perspective. Stories of people, personalities, customers, competition, and foreign espionage are all presented from a business development perspective. Some of the specific strategies covered in this book were great and led to success; some were not so great and led to failure. Some of the capture and proposal approaches and processes had to be executed despite a sometimes uncooperative and/or arrogant senior management attitude. The good, the bad, and the ugly—it is all here.

Although the book is not designed as a tutorial, it does contain several lists discussed in story form, including a list of 12 qualification/capture questions in Chapter 1; a 3-part list of consultant criteria in Chapter 2; and an 8-phase process in Chapter 5. Some of the capture and proposal approaches and processes are overtaken by events (OBE) as more sophisticated approaches and process have now taken their place (for example, some of the factors in the list in Chapter 1 are now typically weighted), but other processes and approaches are still quite valid.

Three additional discussions should be clarified and/or included in future revisions of this book:

(1) International Sales via Foreign Military Sales (FMS): International sales encompass two distinct and vastly different options: Direct Sales to Foreign Governments and FMS Sales (directly through the U.S. Government). The strategies and approaches in each case are very different. However, the book focuses on Direct Sales to Foreign Governments and mostly avoids any recognition or discussion of the significance of FMS.

(2) Comprehensive Corporate Strategy: In Chapter 4, the author threw someone out of his office when that person presented the approach of suggesting to a customer with limited funds that their aircraft could be upgraded (versus trying to sell new aircraft to that customer) with the admonishment "We sell new airplanes." In contrast, based on the approach suggested by Jack Welch, retired General Electric CEO, a comprehensive corporate strategy would have encompassed the following multi-faceted strategy elements:(a) sell new airplanes; (b) refurbish/upgrade airplanes you have previously sold; (c) refurbish/upgrade airplanes others have previously sold; (d) service and maintain airplanes you have previously sold; (e) service and maintain airplanes others have previously sold. Without embracing such a comprehensive, multi-faceted strategy, a corporation is essentially abandoning part of the total market to their competitors and others. Although at this point in the book McDonnell Douglas had not yet laid out a comprehensive corporate strategy, it does appear that a comprehensive corporate strategy was developed subsequent to the Boeing acquisition. However, this is not clearly discussed in the book.

(3) Boeing Acquisition: Discussion of the logic/rationale for and impact (pros and cons) of the acquisition of McDonnell Douglas by Boeing is pretty much avoided in the book, even though (a) the acquisition may have had a significant bearing on the strategies and processes discussed in the book (did Boeing have processes and strategies that were adapted by McDonnell Douglas? If yes, what were they, and how effective were they?); and (b) the acquisition may have resulted in the development of a more comprehensive corporate strategy.

At 184 pages, the book is packed with stories, strategies, and processes related to business development for commercial and military aircraft sales in both domestic and international markets. It is fun to evaluate and apply the portions that are relevant to your own business development efforts, and to compare some of the situations, experiences, and processes/methodologies with your own.

Bruce Morton is Sr. Manager, Capture Excellence at Lockheed Martin Information Systems & Global Services. Concurrently, he is an Adjunct Professor at George Washington University. At prior APMP Conferences, he chaired the panel "Pricing to Win - The Art of Pricing" in 2008, participated on two panels in 2008, presented "Keys to Successful Capture Management" in 2007, and chaired a Capture Management Panel in 2004.

Winning Government Contracts

Malcolm Parvey and Deborah Alston

Career Press, 2008; $13.99

by: **Chris Simmons**

Winning Government Contracts was written to help small businesses find and secure Federal Government contracts up to $100,000. It is a good primer for readers who know virtually nothing about federal procurements and do not know where to begin. Using simple language, it explains the complicated process of learning government jargon, navigating federal business opportunity Websites, and submitting offers. Regrettably, the book does not live up to its title and even includes a number of suggestions that are controversial at best.

What I Liked. The book includes a number of eye-opening facts and figures. I was surprised to learn that the 22.9 million small businesses in the US represent 99.7 percent of all employers, account for 75 percent of all new jobs added to the economy, and represent 50 percent of the private workforce. In fact, the Federal Government issues a whopping 10,000 different sales opportunities every day—many are issued and awarded automatically by computer. This makes the U.S. Government the biggest and (the book argues) the best customer in the world for small businesses. The book includes some practical steps for the 98 percent of registered US companies that do not actively seek out federal contracts such as getting a Data Universal Numbering System (DUNS) number from Dun & Bradstreet and registering with the Central Contractor Registration (CCR) site (www.ccr.gov).

What I Did Not Like. As a small business owner and consultant to companies (large and small) who sell to the Federal Government, I had a natural interest in this book. Despite the interesting facts and Website references, it was much too simplistic for my taste. The book provides marginal value for anyone other than the novice small business executive who knows virtually nothing about federal procurements and needs a place to start.

Although the book was recently published, many of the facts were out of date—especially the page one reference to the number of small businesses in the United States in 2002! The tone is simple and straightforward, but often comes across as naïve. For example, the Chapter 5: Submitting Hard Copy Offer Using Federal Standard Forms conclusion, "be sure your quote arrives on time," was too obvious for me. I also found the 25-page explanation of the block-by-block description of SF33 and the Uniform Contract Format (Sections A-M) lengthy and tedious—even for a novice reader.

The authors' liberal doses of minimized screen shots from a number of government sites serve to break up the narrative, but add little value. Most small company executives and business developers probably do not need this level of detail to get to and navigate popular government Webites, such as the SBA, USPS, VA, and US Patent Office.

Chapter 2: Searching the FedBizOpps Website gets bogged down with 46 pages of detailed discussion on keyword searches, field-by-field descriptions, examples of synopsis pages, and detailed descriptions of the Federal Acquisition Regulations (FAR). The 29-page appendix includes worksheets and 5 pages of country and issue codes that are largely superfluous.

Although Chapter 6: Service Contracts, starts out with the simplistic suggestion to follow solicitation requirements exactly, it also makes the much more controversial recommendation to "use existing marketing literature as the basis for responding to technical requirements." Peavy and Alston stress the importance of submitting a number of offers to increase your chances of winning. Their assertion that "it is more important to be aggressive than competitive" and to "submit as many offers as you possibly can" seems out of touch with today's marketplace.

Winning Government Contracts asserts it has "everything you need to know to win Government contracts." The reality is that the book is a factual reference and training primer for the novice reader to identify contract opportunities. Unfortunately, the focus of this book is more about finding opportunities and submitting bids than actually winning them.

Chris Simmons is an APMP member and acting Chairperson of the National Capital Area Chapter Membership Committee. He is also the principal and founder of Rainmakerz Consulting (www.rainmakerz.biz)—a business development solutions company specializing in proposal development. He can be reached at chris@rainmakerz.biz.

The Back of the Napkin

Dan Roam

1st edition, March 2008, Portfolio Press;
$24.95 hardcover.

by: **Richard Hoffmann**

The title and a first look at Dan Roam's book, *The Back of the Napkin*, tell a lot about the author and his book. The title implies a bit of informality, as does the square format of the book and the casual attitude about starting chapters on an odd page, and the author's tending toward the visual (as accented by his reference to the Introduction, Part 2, Part 3 and the Last Part).

Roam has strong opinions on the use of drawings to explain concepts, and a marked preference for hand-drawn graphics (i.e., back of the napkin) versus computer graphics. In a radical departure from our current dependence on computer-generated slide presentations, he prefers hand-drawn pictures because:

1. "People like seeing other people's pictures."
2. "Hand-sketched images are quick to create and easy to change."
3. "Computers make it too easy to draw the wrong thing."

Number 3 seems at odds with number 2 unless you concentrate on the built-in chart-making functions in many programs that may not present things in the most useful manner.

He does not believe lack of drawing talent is a deal breaker. How you approach the concepts does not depend so much on talent, as what type of graphical person you are. Roam divides people into three categories according to their reaction when faced with a whiteboard:

- Black pen—"Hand me the pen."
- Yellow highlighter—"I can't draw, but…"
- Red pen—"I'm not visual."

Each category has strengths when applied in a given situation. The book provides a short quiz to find your category. After taking the quiz, I learned I am a highlighter.

The book guides the reader through a progression of concepts to explain Roam's rationale for selling ideas with pictures. It is divided into four parts, each with a specific emphasis.

Part I, **Introduction**, defines the problems, pictures, and problem-solvers discussed in the book. It also defines the process of visual thinking, which consists of looking, seeing, imagining, and showing. You look at the problem, see what information is there, imagine what can be done with the information, and figure out how to show someone else your thoughts.

Roam says problems tend to clump according to the six ways we see (the 6 Ws): who and what problems relate to people and things; how much problems relate to quantities; when problems relate to timing; where problems relate to direction and position; how problems relate to relations and effects; and why problems relate to the big picture and what happens next and why.

Part II, **Discovering Ideas**, sets the basis for improved visual thinking: "learning how to *look better*, how to *see sharper*, and how to *imagine* further." It also introduces the SQVID, the <6><6> framework, and the Visual Thinking Codex. One take-away concept is actually seeing what you are looking at and gaining an understanding of it.

The SQVID is a method of focusing on the information we have and how best to present it. S is for Simple vs. Elaborate—how much detail is necessary to show our premise. This can vary not only according to available data, but according to our audience. Q is for Quality vs. Quantity. You could look at a diamond and a ton of corn as being of equal value (depending on market prices), but in one case the primary consideration is quality, in the other it is quantity. V is for Vision vs. Execution—vision tends to be a conceptual target, while execution is a plan of steps and actions. I is for Individual Attributes vs. Comparison, while D (Delta) is for

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"He (Roam) does not believe lack of drawing talent is a deal breaker. How you approach the concepts does not depend so much on talent, as what type of graphical person you are."

Change vs. Status Quo; i.e., are you arguing for a change in direction or maintaining the existing course.

The <6><6> framework correlates the six ways we see with the corresponding ways of showing information.

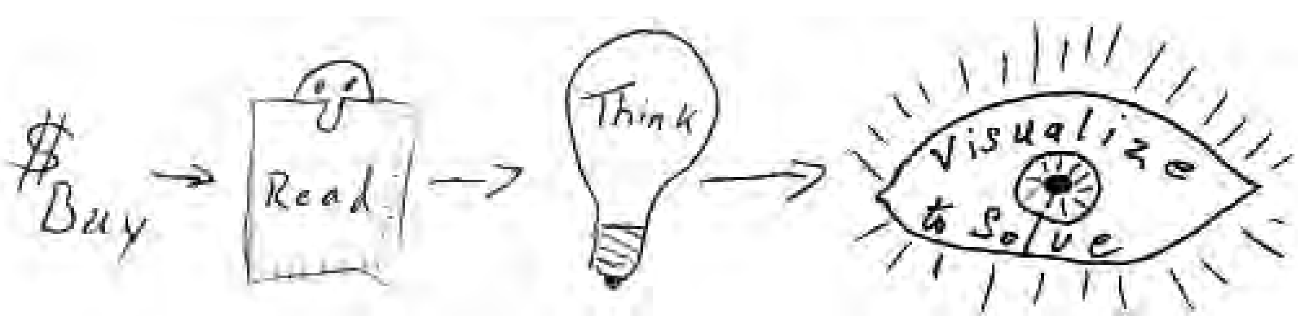
Part III, **Developing Ideas**, is a step-by-step case study applying the concepts explained in Parts I and II. It starts with the 6 Ws and progresses through the <6><6> framework. As Roam takes us through the exercise, he provides graphics developed to illustrate the case. These include some iterative graphics showing initial drawings and progressive changes.

Part IV, **Selling Ideas**, wraps everything up with an executive presentation using the drawings "we" developed in Part III. It also answers the questions: What is the best way to effectively show a picture? and Does a good problem-solving picture have to be self-explanatory?

My biggest quibble is when Roam presents as an example the only computer-generated graphic in the book. He talks at length about how the graphic combined a plethora of information in an easily understandable visual. Roam discusses a project where his team was able to distill voluminous data from spreadsheets and reports in a single graphic that elated his client. He even provides a thumbnail of the graphic, but offers no insight into the relationships among the visual elements, the reason the graphical elements were selected, or why or how it worked so well.

Roam does a good job of presenting his case for visual thinking in the book, including providing appendices offering possible scientific corroboration for his visual thinking and other relevant resources.

I believe the book will prove useful to many people, even those not artistically talented. Application of Roam's concepts in real-world situations could help develop useful solutions or conclusions. To prove that his concept does work, I encourage readers to:



Charting a Path to Project Management Sophistication

Parviz F. Rad

Project Management Excellence, LLC; October 2007; $25.00

by: **Susan Malkus, PMP**

Charting a Path to Project Management Sophistication is based on the premise that project management sophistication (evidenced by stable, highly repeatable and frequently monitored project management processes) yields highly functioning and productive teams; high-quality products; high customer satisfaction; and, ultimately, higher corporate profits. In this relatively short book, Dr. Rad promotes the existence of sophisticated project management processes and gives the reader a good foundation of the organization and attributes of an effective project management organization. He thoroughly describes the differences between team- and enterprise-oriented functions, and advocates an organization's transition to the enterprise-driven approach, which yields more sophisticated project management processes.

A large part of the book is devoted to the description of project management maturity models and processes involved with the planning, conduct, and analysis of an organizational project management maturity assessment. The book concludes with sample assessment instruments that can be used to provide a rough estimate of an organization's project management maturity on a scale from 1 to 5 (5 being most sophisticated).

> *"Readers can quickly identify with the sometimes humorous examples provided."*

The book is particularly helpful in describing different maturity models and in providing checklists to conduct a quick project management maturity assessment. The most interesting of these is a comparison, across several variables, of an organization with highly sophisticated project management processes compared to one without them. The comparison illustrates the benefits of sophisticated project management processes to the organization, project staff, and clients. Readers can quickly identify with the sometimes humorous examples provided and can better appreciate the trickle-down benefits of project management sophistication.

To be consistent with the title of the book, *Charting a Path to Project Management Sophistication*, it would be helpful to add a chapter devoted to action steps required to progress from one level of project sophistication to another. Currently, the book thoroughly describes the end states of the project sophistication levels and gives examples of organizational behavior in each level, but does not give proactive suggestions for progressing to a higher level. This sort of action-oriented path would be very helpful for an unsophisticated project management organization planning to improve its project management processes and procedures.

Of particular interest to proposal development professionals is the discussion regarding the prioritization of competing proposal opportunities within the Project Portfolio Prioritization section of the book. The author explains that proposals are specialized projects and are often managed in the larger context of a project management office or PMO.

I recommend this book, especially to managers of small and emerging businesses contemplating the implementation of an executive project management office and to anyone interested in conducting a project management sophistication assessment.

Susan Malkus, PMP, is the Director of Training Solutions at Universal Systems and Technology, Inc., and has served as program manager, proposal manager, and capture manager within the training and simulation community for more than 15 years. She can be reached at smalkus@unitech1.com .

Proposal Development: A handbook for proposals submitted to the U.S. Government

Paul Graf and Dr. Joe Mason

Sineo Systems, LLC; 2007; $29.95

by: **Lisa Payne**

This book details the complex process of producing a proposal in response to a Federal Government Request for Proposal (RFP). It consists of a 27-page overview, followed by 11 appendices containing samples from an RFP, planning documents, volumes, evaluation notices, review sheets, metrics forms, and other examples. It is intended as a reference handbook for novice proposal professionals. The introduction suggests reading the process overview and then skimming the appendices. After reading the entire book, I agree with the author's suggestion as the best course of action.

> *"I am not sure that a person new to the proposal profession should begin their education by reading this book... (however, it does) offer some valuable nuggets..."*

I am not sure that a person new to the proposal profession should begin their education by reading this book. Not because it does not offer some valuable nuggets, but because the format and organization of the information is inconsistent and difficult to follow. What begins as a logical presentation of a very complex process dissolves into a series of confusing samples. Concepts introduced in the overview are sometimes detailed in an appendix, but not in the same order, and there are appendices covering topics that are not introduced in the overview. Similar terms are used to describe two different proposal tools, and the overall format is inconsistent. These issues create a difficult reading and learning experience.

Introducing proposal development as evolutionary, with each step building on the previous one, is a perfect way to present the process to a novice proposal professional. For this reader, however, the book failed to successfully reach that objective. I found myself flipping back and forth between the overview and the appendices trying to match timelines with examples.

A well-written proposal will artfully guide a reader through a complex maze of requirements and responses, resulting in the smooth transfer of knowledge and experiences. I think that any book on the subject should reach that same goal. It is my humble opinion that if this book had been a proposal, it would have received many evaluation notices.

I cannot say that I did not learn anything from this book, but it was difficult to understand the logic behind the organization and presentation of the material. The authors are clearly experienced proposal professionals, and I will keep this book in my reference library. I am afraid it will not be my first choice when I need help.

Lisa Payne is the President and Co-Founder of XRSolutions, a software company dedicated to improving the government proposal response process through innovative software technology. She has 15 years' experience developing and implementing proposal automation solutions, as well as providing specialized proposal consulting services to Fortune 1000 companies in North America. She is an APMP member and serves as Treasurer of the Nor'easters Chapter.

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Fall/Winter 2008

Article	Keller, Chuck	The Proposal Exorcist: Attacking 12 Proposal Demons
Article	Herther, Jay	Smooth Hand-Offs from Capture to Contract
Article	Boretz, Mitch and Jolly, Colleen	The Clothes that Words Wear: Evolving Communications Technology is Driving Proposal Tyopgraphy and Formatting
Award	APMP	The APMP Fellows Award
Forum	Eassom, Dick	CEO Forum
Review-Book	Whitley, Mark	Life's a Pitch
Review-Book	Blakney, Betsy	Cracking the $500 Billion Federal Market: The Small Business Guide to Federal Sales
Review-Book	Paskun, Ali	Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (5th Edition)
Review-Book	Simmons, Chris	Why We Talk: The Truth Behind Word of Mouth Marketing
Review-Book	Paskun, Ali	The Power of Body Language: How to Succeed in Every Business and Social Encounter
Review-Book	Lohfeld, Robert	Shipley Capture Guide Winning Strategic Business
Review-Book	Witt, Chris	How to Wow: Proven Strategies for Presenting Your Ideas, Persuading Your Audience, and Perfecting Your Image
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Spring/Summer 2008

Article	Herther, Jay	The 3-Ring Model for Motivating, Recognizing, and Rewarding the Proposal Management Team
Article	Moss, Ann L. and Parkinson, Mike	Visual Proofreading: Three Steps to Proofreading Proposal Graphics
Article	de Castro, Giandra	Pioneering Proposal Management in France
Article	Sokolow, Jayme A.	Proposal Professionals and the Pursuit of Happiness
Article	Glueck, Kellie	Strong Branding in Proposals Increases Success
Award	APMP	The APMP Fellows Award
Forum	Eassom, Dick and Taylor, Paul	CEO/COO Forum
Review-Book	Vogel, Kerriann	Managing Externally–Funded Projects
Review-Book	Blakney, Betsy	Bids, Tenders & Proposals: Winning Business Through Best Practices
Review-Book	Frey, Robert S.	Do-It-Yourself Billion Dollar Business Graphics: 3 Fast and Easy Steps to Turn Your Text and Graphics into Graphics that Sell
Review-Book	Paskun, Ali	What People Want: A Manager's Guide to Building Relationships that Work
Review-Book	Paskun, Ali	The Language of Success: Business Writing that Informs, Persuades, and Gets Results
Sponsorship	APMP	2008 Corporate Sponsors and Alliance Partners

Fall/Winter 2007

Article	Andrews, Holly T.	It Takes a Village—Or Why the APMP's Professional Accreditation Program is Important to Our Profession
Article	Brown, Ray	The Art of Bids and Proposals
Article	Divine, Charlie	BD–KnowledgeBaseTM—APMP's Body of Knowledge
Article	Elder, John	Chapter Spotlight
Article	Glueck, Kellie	Strong Branding in Proposals Increases Success
Article	Morgenstern, Jessica	A Look at Industry and Government Acquisition Lifecycles
Article	Ritchey, Robin	And the Survey Said... Soliutions to Everyday Challenges
Award	APMP	The APMP Fellows Award
Forum	Eassom, Dick and Taylor, Paul	CEO/COO Forum
Review-Book	Blakney, Betsy	Writing White Papers (by Michael A. Stelzner)
Review-Book	Paskun, Ali	The Jelly Effect (by Andy Bounds)
Review-Book	Paskun, Ali	Project Portfolio Management Tools and Techniques (by Parviz F Rad and Ginger Levin)
Review-Book	Paskun, Ali	Proposal Writing to Win Federal Government and National Laboratory Contracts (by Joseph R. Jablonski)
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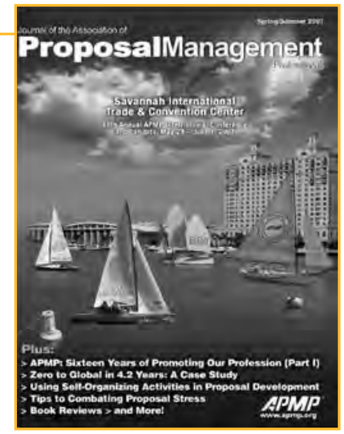
Spring/Summer 2007



Article	Blakney, Betsy	The Savannah Experience
Article	Birch, Tony	How to Ensure Your Presentations Work … Every Time!
Article	Nutt, Howard	BD CMM Workshop Offered at the Conference
Article	Paskun, Ali & Elder, John	History of APMP—Promoting Our Profession (Part III)
Article	Gregory, Eric	So You Want to Fly with Different Wings? Proposal Career Paths in Private Industry
Award	APMP	The APMP Fellows Award
Forum	Birch, Tony and Taylor, Paul	CEO/COO Forum
Review-Book	Paskun, Ali	Win That Pitch (by Andy Bounds)
Review-Book	Wingate, Beth	Billion Dollar Graphics (by Michael T. Parkinson)
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Fall/Winter 2006

Article	Herther, Jay	Campaign to Win!
Article	Jolly, Colleen	How to Hire, Train, and Keep Qualified Interns
Article	Gault Galjan, Anna	Survival Guide to Proposal Management for New Proposal Managers
Article	Parkinson, Michael	Getting Proposal Graphics Right the First Time
Article	Sokolow, Jayme A.	The Legacy of Peter F. Drucker
Article	APMP	Authorized Training Organizations
Annual Conf.	Winton, David	2006 APMP Conference and Awards
Award	APMP	The APMP Fellows Award
Forum	Birch, Tony and Taylor, Paul	CEO/COO Forum
Review-Book	Paskun, Ali	Before and After Page Design (by John McWade)
Sponsorship	APMP	2006 Corporate Sponsors and Alliance Partners

Spring/Summer 2006

Article	Day, Cathy	APMP Launches the First Approved Training Organizations (ATOs) for the Accreditation Program
Article	Frey, Robert S.	Framing: An Exciting and Proven Tool to Align Your Customer's Thinking with Your Proposal Story
Article	Herther, Jay	To Bid or Not To Bid? That is the Question!
Article	Kumpf, David C.	It's Easy to Understand what You are Proposing: Simplifying Life for Evaluators
Article	Newman, Larry	Persuasion and Decision-Making: Integrating Proposal Lore in Winning Proposals
Article	Parkinson, Michael	Making Graphics that Communicate Clearly
Article	Paskun, Ali and Elder, John	APMP: Sixteen Years of Promoting Our Profession (Part II)
Annual Conf.	Keller, Chuck and Winton, David	The APMP Annual Conference Returns to New Orleans as Life Returns to the "Big Easy"
Award	APMP	The APMP Fellows Award
Forum	Birch, Tony and Taylor, Paul	CEO/COO Forum
Int'l Report	Taylor, Paul	2006 APMP International Report
Review-Book	Paskun, Ali	The Booklover's Guide to New Orleans (by Susan Larson)
Sponsorship	APMP	2006 Corporate Sponsors and Alliance Partners

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