Welcome

Ali Paskun, AF.APMP

It is hard to believe that another year has gone by; registration is open for the 22nd Annual APMP® International Conference and Exhibits at the Sheraton Denver Downtown, CO from 31 May–3 June 2011. All the information you need, such as the conference schedule, presenters, and presentation abstracts, are available on the updated APMP Website (www.apmp.org). The focus of this year's conference is "The Art of Winning." Remember, if you have achieved APMP accreditation, you can earn up to 10 CEUs for attending.

While we focus on winning when working a proposal, losing is a real possibility. We would rather win every bid we pursue; however, that will never be the case. In her article, "Learning form Losing," Wendy Frieman, PPM.APMP points out, "Most proposals are losing proposals—a statistical fact that is often ignored." She offers guidance using a focused four-step process to help proposal professionals benefit from a loss because "…failure is a better teacher than success." The four-step process is a tool that can turn every proposal into an opportunity to learn and improve.

Pizza and subs traditionally have been part of every proposal professional's diet (especially during late nights and weekends). Now cake can officially be added. Michele Rochon shares a creative, fun, and tasty exercise in team building in which teams compete in a cake-baking contest that parallels the proposal development process. I hope everyone who tries this exercise with their teams will share their experiences with the rest of us!

How many times a day do you hear the new catch phrase, "There's an app for that"? Have you ever wondered if there are any apps that can make life easier for proposal professionals? Beth Wingate, AF.APMP answers that question with a list of products each of us can add to our toolkit to help with such activities as graphics development, online collaboration, or writing.

As I am sure everyone knows by now, we have a new Executive Director, Rick Harris. A change that has been made to The *Journal* is that Rick will contribute a column in each issue entitled "Executive Director Forum." It will give all of us a view of APMP from Rick's perspective and perhaps generate the sharing of ideas. In his first Executive Director Forum, Rick discusses viewing our membership numbers in a positive way as a sign of APMP's strength and value to all members.

On behalf of the *Journal* staff, I would like to say "Welcome!" to Rick and a special "Thank you" to David Winton, who has assumed a new role as Chief Financial Officer, for his many years of dedication to APMP. Want to join us and help move APMP to even higher levels of excellence? Join a committee in your chapter. Give a presentation at a local, national, or international event. Offer to peer review a submitted *Journal* article. Participate in a discussion on the Website, and share a technique you use to improve the proposal process where you work (and if that technique involves cake, you have to invite us to the demonstration!).

See you in Denver!

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Executive Director Forum: **Quality over Quantity**

Rick Harris, Executive Director, APMP

Our culture is obsessed with numbers, and we use those numbers to get to the bottom line as fast as possible. Numbers are exciting to track when they are on the rise, and they make us nervous when they remain flat or decline.

As the new Executive Director of APMP, a large part of my day is spent analyzing information, including the number of conference registrations, accreditations, and general members.

We should be celebrating APMP's membership number instead of viewing it as an indicator that we are not doing enough. As of this writing, our association has 4,332 members in 28 chapters across 68 countries. It is true that some chapters are bigger than others and that is always going to be the case. However, collectively, we are 4,332 members strong, and that is the way I prefer to look at it.

APMP chapter chairs have told me that their biggest concern is how to increase their membership numbers. When asked why this is such a big concern, they have often mentioned that other nearby chapters are larger and attract more members. They worry that they are falling behind or are not relevant simply because their membership number is not as strong as a neighboring chapter.

Some of the same chapters that worry about their membership numbers are holding high-quality, thought-provoking education and networking meetings for their local APMP members. They are also partnering with other regional associations to expand their reach. They are delivering incredible value to the members they have. That is what we want. Is your chapter serving the majority of members in your chapter the best way that it can? My advice is to not focus on your membership number itself, but rather on the types of membership offerings that will deliver the greatest value to your current members.

If you are an APMP member and you think your chapter can do more, I encourage you to volunteer by participating and you will get more out of your membership. APMP membership is important for those who want to network with other professionals and share best practices.

One of APMP's many advantages is that its membership dues cost only $125 annually. That is about $10 a month—an incredible value for anyone who wants to stay connected to their peers, learn best practices, and be a part of a highly regarded association that serves the proposal, business development, and capture professional.

About 60 percent of associations surveyed said that their 2010 membership numbers increased, according to a recent Membership Marketing Benchmark Report for the American Society of Association Executives (ASAE). The number one membership driver, according to the ASAE report, is the discount that members get at their association annual conferences or events. APMP's membership retention is better than the retention benchmark cited by ASAE, and we are doing a terrific job at enrolling new members.

So why the worry about our membership numbers, especially locally? People always want to improve their performance, and it is natural to make comparisons among chapters in terms of the total membership as a bottom line.

If you have an innovative idea for improving the quality of your chapter membership services that you would like to share with me, please send it to me at rick.harris@apmp.org or you can call me at 202-450-2549 to talk about it. If you would like me to talk to your chapter about improving the quality of your chapter membership services, just invite me and I will be on your next call.

Let us work on improving the quality of our local membership services. Embrace your membership numbers locally; let us provide as much benefit as we can locally and our numbers will grow internationally.

"collectively, we are 4,332 members strong"

The Art of

22nd Annual APMP® International Conference and Exhibits

Sheraton Denver Downtown, Colorado

31 May–3 June 2011

History teaches us that the most significant battles throughout the ages that were won were well planned, staged, and executed. Battle victories were not based on hope but were fully prepared for. Significant time, money, lives and resources were spent to make these efforts successful.

Sun Tzu's book, the Art of War, has survived the ages as a "must read" in all military training programs. As in war, winning proposals must be well planned, staged, executed and acted upon. Join us and our industry generals as we look at the new global battlefields through business development, capture management, and proposal management eyes and learn how to best position our resources and to develop our plans to win.

The focus of the 22nd Annual APMP® International Conference & Exhibits is The Art of Winning. Our global economies are changing. How we win business in these environments is also changing. Determining the markets and opportunities to pursue often demands intelligence gathering, increased expenditures, and the planning and commitment of resources as never before. Our battlefields often know no boundaries, crossing oceans, cultures, and economies. How we react and prepare for these business opportunities often determines whether we win or lose. The better we prepare, the better we understand the battlefield, the better we know our competition, the more business we win

Because you know our Business Development, Business Capture and Proposal Development processes must adapt to these environments, you should come to our conference prepared to expand your knowledge and understanding of the operational art required to win consistently. Hear global leaders in the fields of Proposal Management, Capture Management, and Business Development offer their methods that position them for victory.

The entire Business Development lifecycle will be examined. Key leaders from around the world will present on a wide variety of topics to provide an arsenal of tools, processes, and competitive weapons that have led to successful battles in competitive procurements.

New for this conference is an Executive Track, where you can listen to and interact with industry Executives. These Executives have shaped and continue to lead their companies' efforts to achieve wins in today's increasingly competitive market place, where strategy and tactics often take the form of classic battles, and where knowledge of the terrain, knowledge of the enemy, and logistics rule the day. Hope is not a strategy and luck is not a tactic.

Continuing Education Units:

A benefit of attending an APMP event is for earning continuing education units (CEUs) for maintaining Professional Accreditation. For those who are accredited, or are thinking of becoming accredited, maintaining CEUs is required. Up to 10 CEUs are available to earn for attending the Annual APMP International Conference & Exhibits.

Winning

Event CEUs

- **5**–Local APMP Chapter, or other Business Development professional body meeting
- **5**–Partial-day conference, symposia, seminar, meeting
- **10**–Full-day (or more) conference, symposia, seminar, meeting

Testimonials

"Very informative! While I use most tools that were reviewed there were 2 new ones I learned about and now am using." (2010 APMP International Conference)

"Great session, informative and entertaining and dense material presented in an intriguing manner." (2010 APMP International Conference)

"Very good information provided. Practical and informational. Learned something new. Reinforced other learning." (2010 APMP International Conference)

"Valuable information, even for those on the commercial side. Not government focused, which was a plus." (2010 APMP International Conference)

"SO nice to hear from someone who's not kneedeep in BD or Proposals, yet has something to contribute to our work/life balance." (2010 APMP International Conference)

"I greatly benefit and learn so much from these government/industry panel/task force presentations. The panel participants always do an exceptional job of preparation and presentation. Keep up the good work!" (2010 APMP International Conference)

"So many great tips, tools and take aways!" (2010 APMP International Conference)

"I've been doing proposals for more than 20 years. I always come away from the conferences with something new – whether it's a reminder on the basics of doing proposals, or a new tool or technique that I can apply." (About APMP International Conferences)

"[The speaker] shared quite a bit of real-world examples from her firm and gave us info that was useful in our daily work." (2008 APMP International Conference)

"Teaming and subcontracting is becoming a routine exercise in the MAC/IDIQ arena, and this presentation provided me with a good understanding of the basic criteria and how I could proactively implement them early in the proposal process." (2008 APMP International Conference)

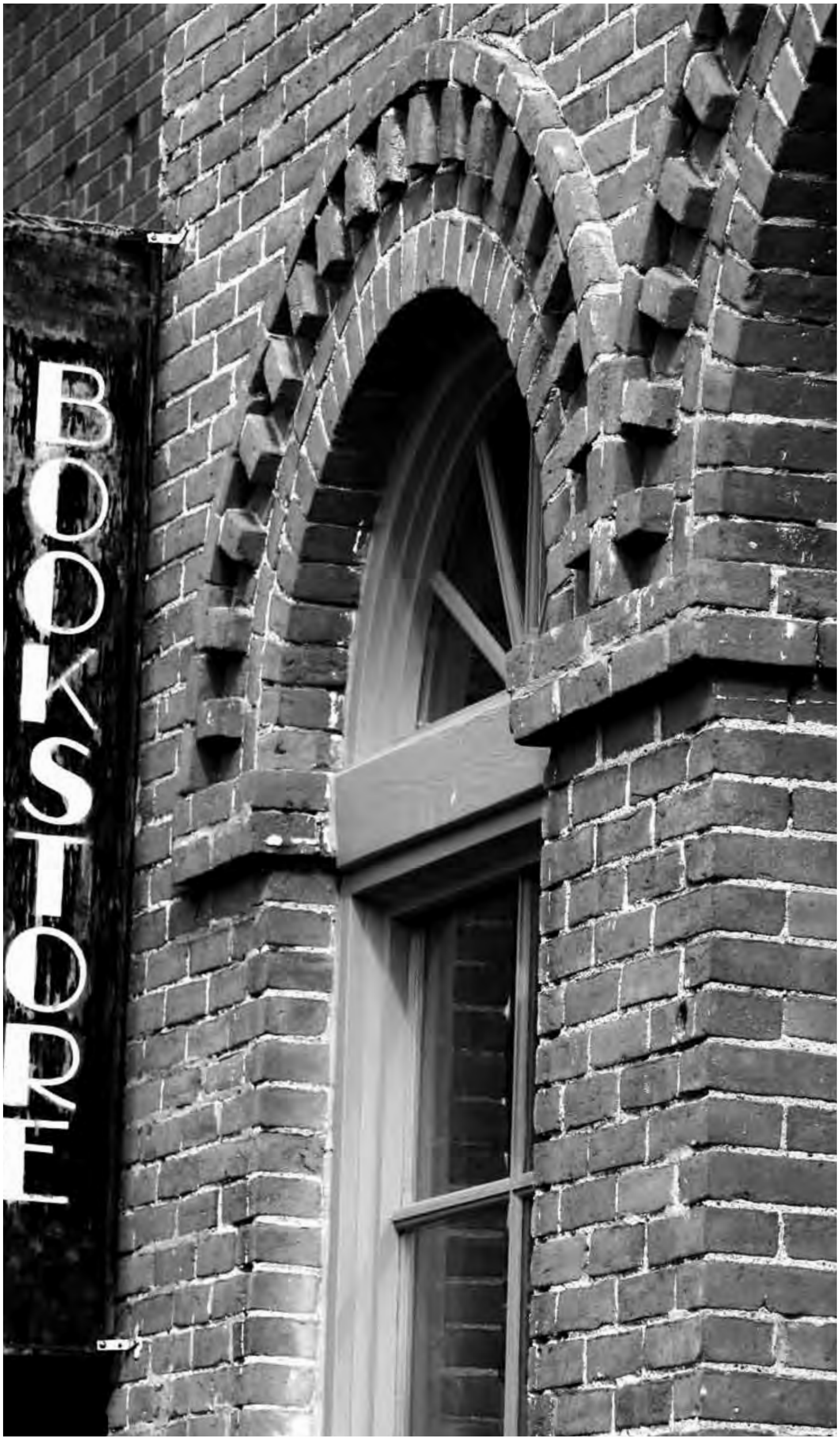
"Insightful yet down-to-earth, very well-balanced approach. So good I immediately sought out the speaker's publication and bought it. One of the best and useful presentations I saw this year." (2008 APMP International Conference)

"Excellent content and excellent speaker. Some solid lessons given that can be implemented immediately." (2008 APMP International Conference)

"I find that standing out in a crowd is always something I run into…This session provided some new tricks and ideas." (2009 APMP International Conference)

"This was THE most applicable presentation I went to. I will definitely run back to the office and make this happen!" (2009 APMP International Conference)

Searching for a book?



We got it.

Book Store

May 31–June 3, 2011 at the

22nd Annual
APMP® International
Conference & Exhibits

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

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.

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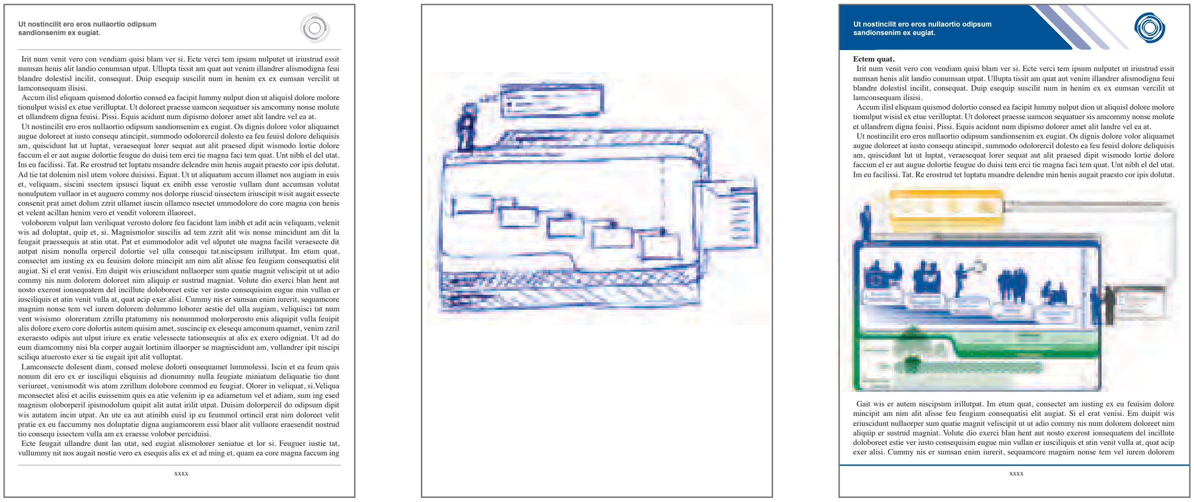
Our mission is to advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.

win more business



from text or idea → through concept → to completion

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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. Retiree and (full-time) student membership dues are $75.00 (USD) per year. 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.

APMP's Federal Tax ID Number is 87-0469987.

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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 through June 30, 2012:
Rates per Issue
Premium Placement Locations*
(Sold for both 2011 issues)

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

All Other Placement Locations*

- Full Page: $2,500.00 (4 Color)
- Full Page: $2,200.00 (B&W)
- Half Page: $1,500.00 (B&W)

*15% discount for all contracts of three or more consecutive issues with payment in advance. (Rates for 2012 will be published in the Fall/Winter 2011 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 Rick Harris at (202) 450-2549 or email info@apmp.org

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, call or email us:

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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.

Guidelines for Authors

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

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

	Spring/ Summer	Fall/ Winter
Concept approval	August	February
Summary and outline due	October	April
Article first draft 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 (Managing Editor, Assistant Managing Editor, and two anonymous outside reviewers). 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.

Acceptance

When appropriate, authors whose articles or book reviews have been accepted for publication will be responsible for incorporating comments from the Editorial Advisory Board into the final version of their articles. Once an article or book review has been accepted for publication, it will be subject to routine copyediting by the staff of *The Journal*. Copyediting is an internal process and consequently copyedits will not be reviewed by authors.

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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Learning From Losing

By Wendy Frieman, PPM.APMP

No one wants to lose, and no one wants to talk about losing. It is like talking about death. But failure can be an effective teacher.

Most proposals are losing proposals—a statistical fact that is often ignored. But this does not mean that the participants are losers. Consider the career of Mike Krzyzewski (Coach K), a basketball legend who inspires his players to greatness. Under his direction, the Duke University basketball program has become one of the most successful in the history of the sport. Coach K has been selected as National Coach of the Year 12 times and has been inducted into the Basketball Hall of Fame. By any objective standards, he is a winner. Yet 31 of his 34 seasons at Duke have ended with a losing game. After all, at the end of any season, only one team wins. In proposals, as in basketball, there is just one winner. Even in the case of large contract competitions, which sometimes do result in more than one winner, the subsequent delivery or task order competitions narrow the field down to one.

Why Talk About Losing?

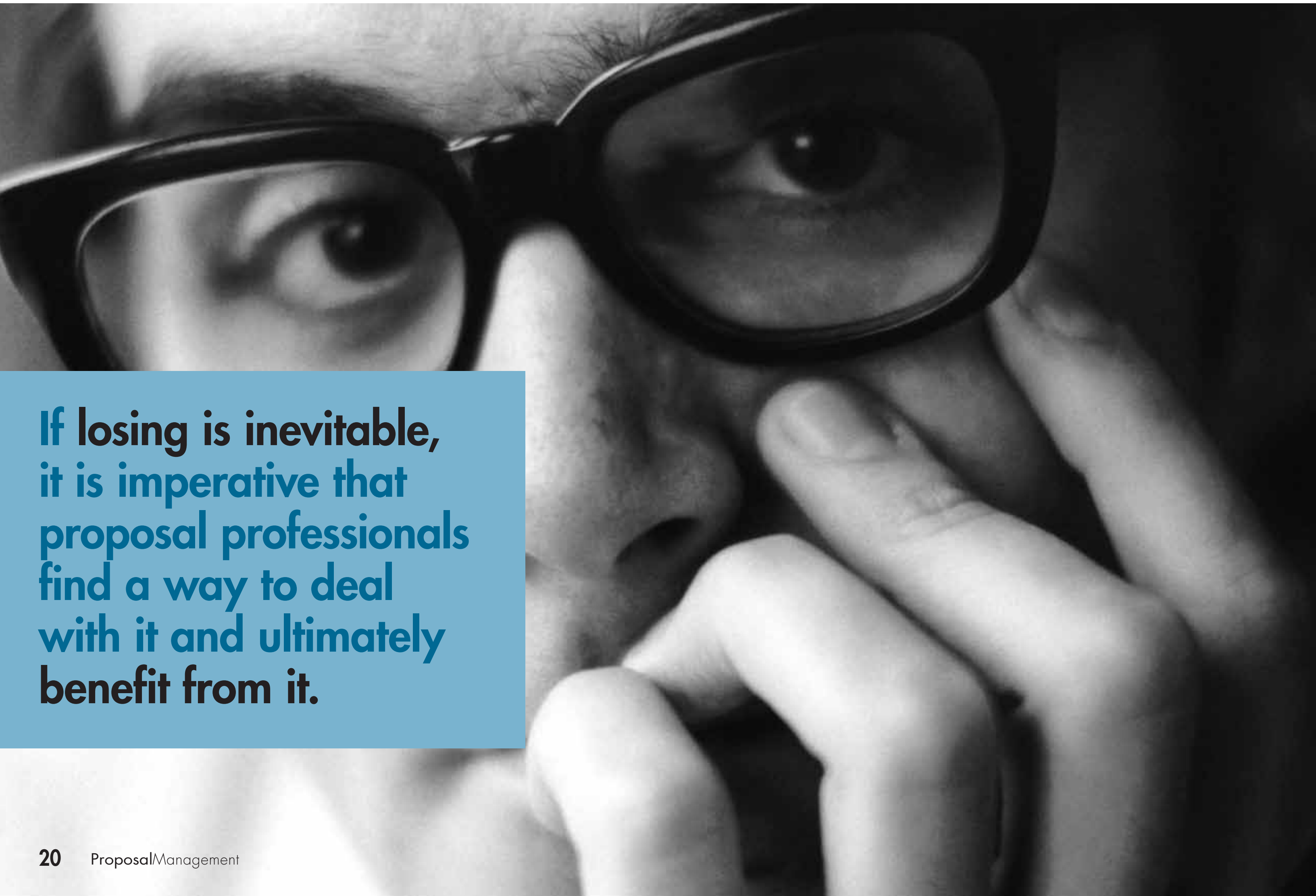
The reasons to study losing are numerous and compelling. The first is that uncomfortable statistic: most proposals lose. Therefore, all proposal professionals experience a loss at some point. In fact, corporations already accept the fact that losing is inevitable, and that is why the values of opportunities in the pipeline are weighted according to win probability. No one would believe a forecast if it assumed a 100-percent win probability for all opportunities in the pipeline. Of course, at the level of the individual deal and the individual proposal team, everyone involved has to believe that winning that particular deal is at least possible, if not likely.

If losing is inevitable, it is imperative that proposal professionals find a way to deal with it and ultimately benefit from it. Instead, many proposal professionals—and managers, executives, subject-matter experts, and production staff—bypass the opportunity to learn from a loss. Individuals and the organizations they work for try to forget about it, deny it, rationalize it, blame it on something, or engage in unyielding self-criticism.

Moreover, losing is important because, for both psychological and cognitive reasons, failure is a better teacher than success. Most people know this instinctively from their own experience, and it is substantiated in empirical studies (Edmondson, *The Hard Work,* 2005; Ulmer 2006). Errors "provide a 'clear signal' that facilitates recognition and interpretation of otherwise ambiguous outcomes," and failure "provides a 'learning readiness' . . . difficult to provide without a felt need for corrective action" (Sitkin, 1996). In a study of the neurological foundation of learning, Jonah Lehrer observes, "Unless you experience the unpleasant symptoms of being wrong, your brain will never revise its models. Before your neurons can succeed, they must repeatedly fail. There are no shortcuts for this painstaking process." (Lehrer 2009) In the final analysis, proposal professionals are lucky because the events from which people learn the most—losses—are ones that they will inevitably experience.

Finally, losing merits attention because learning from failure is difficult and must be approached in a careful and sometimes counterintuitive way to be successful.

This article sets forth four steps that facilitate learning and growing after a loss. It examines the literature that documents the approach to failure in other contexts (health care, aviation safety, entertainment, foreign aid, and military training) and explores the reasons why organizations find these steps so difficult to implement. For each such reason, the article presents remedies and techniques that proposal teams can use. Finally, it addresses the need for a code of conduct after a loss.



If losing is inevitable, it is imperative that proposal professionals find a way to deal with it and ultimately benefit from it.

The Four-Step Process

Proposal and capture teams need to go through four steps to benefit from a loss. These steps are based on common sense, observation of how proposal teams behave, and insights gleaned from literature from other disciplines. They are derived from, and align with, the following process developed at the *Center for Creative Leadership*: "exploring, reflecting, and projecting" (Ernst 2006). The four steps are:

1. Find out what happened
2. Determine causality (i.e., determine which events, decisions, or thought processes were actually responsible for the loss)
3. Take action, if appropriate, based on lessons learned
4. Let go and move on.

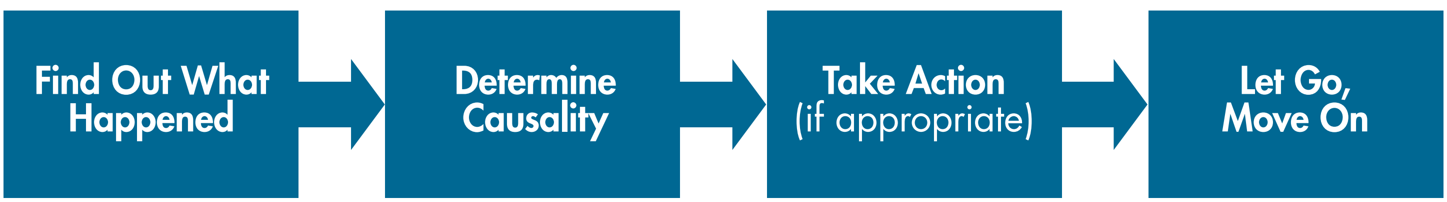
Each step must be performed sequentially to be effective. When teams rush the process, they are likely to err in either their analysis or their corrective measures. What actually happened must be determined before the question of causality is tackled, because of the many unfortunate events that can occur during a proposal only a subset constitute the actual cause of the loss. Taking action needs to be postponed until all the fact-finding and analysis are done; otherwise, teams are likely to take the wrong action. Trying to move on without completing the first three steps leaves participants with a nagging sense that there are loose ends, and it saps energy from future endeavors.

Each step, though fairly simple in concept, is often performed in the most superficial way in both large and small companies—if at all.

Step One: Find Out What Happened

This step sounds straightforward. In fact, it is an emotionally challenging and intellectually demanding task. The team must dispassionately review the entire history of the procurement. They must ask detailed questions and dig into the specifics of the deal without assigning blame or trying to settle old scores. It means carefully examining the relevant documents, including capture plans and briefings, the presentations prepared for gate reviews, teaming agreements, solution charts, color-team review inputs, and the proposal itself. It takes time and attention to detail, and it depends heavily on documentation. Without an audit trail, those conducting the assessment have to rely on interviews and the vagaries of human memory, and the process will take much longer.

Proposal professionals depend on best practices and repeatable processes, but each opportunity is unique, and each post-loss fact-finding exercise is also unique. Thus, although it is tempting to use a checklist to complete the post-loss analysis, overly rigid analysis will prevent the team from uncovering what really happened. A variety of approaches are worth considering, and which is best will depend on the specific opportunity. One approach is to assess events according to function: pricing, customer relationships, solution, etc. Another is to approach the opportunity from a chronological perspective. A third is to look at critical decisions that were made along the way. This is a time to ask tough questions and challenge accepted wisdom about corporate policies and established routines. The best practice in the world might not have been the right one for this specific opportunity.



Taking action needs to be postponed until all the fact-finding and analysis are done; otherwise, teams are likely to take the wrong action.

Get a formal debrief from the customer and put that debrief in context

Former government contracting officers offer the following suggestions to maximize the value of the debrief:

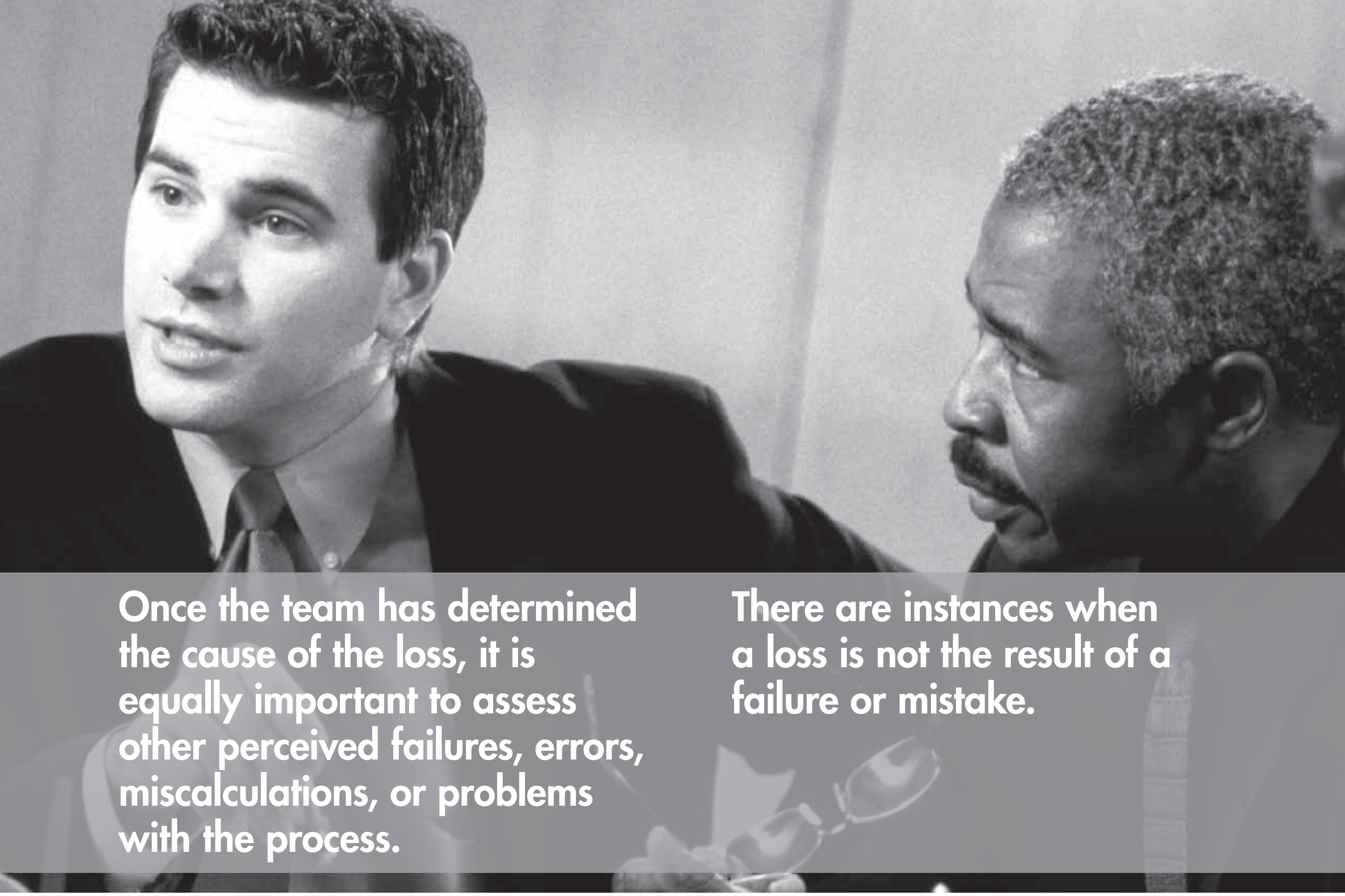
- Be a good loser. Behave in a respectful, friendly manner. Hostility will work against the chance to get useful information. Let the Government know that you are there to learn. Not only will you stand a better chance the next time—you could distinguish yourself from the other losers.
- Remember that the decision will not be reversed at the debrief. If there are legitimate grounds for a protest, they need to be explored through legal channels in accordance with the FAR. Do not try to argue that your proposal should have been the winning one. It was not.
- Select the participants carefully (within the constraints established in the RFP). Bring people who will really listen rather than talk. Participants should be able to repeat what they have heard without filtering or exaggerating.
- Know your proposal intimately so that when the Government refers to a strength or weakness, you will be able to tie it to a proposal section. If you know the proposal well and cannot make the connection, ask for specifics.
- If you have not been to a debrief before, role play and rehearse ahead of time.
- Prepare. Ask who will represent the Government at the debrief, and make sure that you are familiar with FAR 15.5, which stipulates what the Government is required to provide at a debrief.

Information from the debrief has to be weighed fairly and rigorously against all other data points collected during the post-loss analysis.

Step Two: Determine Causality

The second step is to determine the underlying reason or reasons for the loss. This means going through the long list of events assembled in Step One and determining which actually caused the loss. Determining causality is not the same as conducting root-cause analysis. The distinction is subtle but important. Root-cause analysis gets to the core of why a specific event turned out differently than desired. But that particular event, however unfortunate, might be unrelated to the loss. Confusing correlation and causation is a common error made by proposal teams after both wins and losses. Interestingly, it is also made when studying successes in general. Jerker Denrell highlights the pitfalls of perceiving causation where it does not exist through an absurd example involving successful executives. All successful executives have one thing in common: They all brush their teeth. Of course, so do unsuccessful executives. So, tooth-brushing does not necessarily result in success (Denrell 2004). In the proposal environment, it is easy to assume that the team won because of a highly technical and well-documented solution. Yet the team might have actually overcomplicated the problem and won in spite of the solution and not because of it. It is even easier to jump to these types of conclusions after a loss.

How can teams determine causality? First, do the work required to get through Step One and do not stop until it is done thoroughly. Second, get a formal debrief from the customer and put that debrief in context. Most teams that do not do the analyti-



Once the team has determined the cause of the loss, it is equally important to assess other perceived failures, errors, miscalculations, or problems with the process.

There are instances when a loss is not the result of a failure or mistake.

cal homework described in Step One rely disproportionately on the customer debrief. Information provided at a debrief might explain or lead to an explanation of the underlying reason for the loss, but it might not. Debriefs are inherently contentious events. Both sides enter the discussion with apprehension. Some bidders are tempted to defend their proposal; some argue with the government contract staff. Very few people, including mature professionals, take criticism well. Even if everyone involved remains calm, it is not always easy to get to the underlying reasons. Sometimes the evaluation of the proposal appears to be based on generalities rather than specifics. And government customers are subject to the same psychological biases that affect proposal teams. Sometimes different government opinions have to be reconciled, and the final decision might not reflect the range of views on a proposal. At the same time, customer debriefs often reveal legitimate shortcomings of the proposal or the solution. Nonetheless, even if all debriefing material can be taken at face value, it has to be carefully weighed.

Ultimately, the information from the debrief has to be weighed fairly and rigorously against all other data points collected during the post-loss analysis. It is a set of data points. It can neither be entirely ignored nor taken entirely at face value.

Determinations of causality will always be partially subjective. Yet thorough documentation and careful analysis by individuals with both experience and good judgment can reduce the degree of subjectivity.

Once the team has determined the cause of the loss, it is equally important to assess other perceived failures, errors, miscalculations, or problems with the process. Just because those events did not lead to a loss this time does not mean that they do not merit attention. They might cause a loss the next time. In assessing these other events, it is important to get different perspectives. Was the event a function of unique circumstances, or did it reveal a systemic weakness? The author and journalist Alan Beattie recalled a biologist telling him that all biologists could be categorized as either "lumpers" or "splitters" (A. Beattie 2009). Lumpers tend to group things together and develop rules to explain that group; splitters see each event as unique and in a specific context. In a post-loss analysis, both perspectives are needed. Some events are flukes. Others are part of a pattern.

Conversely, there are instances when a loss is *not* the result of a failure or mistake. This is a critical determination because, if this circumstance is not correctly identified, teams might try to fix what is not really broken, and they might discard valuable processes, techniques, and potentially reusable proposal content. Many proposal professionals instinctively assume that there is always a way to win in any situation. But this is not always true. No team has perfect knowledge and uncontrollable events do occur.

Step Three: Take Action

The work entailed in Steps One and Two is demanding on many levels. Yet it is not worth doing unless the organization is prepared to follow through on the remaining steps. Investing the resources required to acquire knowledge but then failing to follow up on it has repercussions for organizational efficiency and team morale. Analysis must be followed by action. The most efficient way to approach this step is to examine all the events discovered in the previous two steps and categorize them. (This is when to get the "lumpers" involved.) Most proposal errors, failures, and weaknesses fall into one of the following categories:

- Weak leadership
- Errors in judgment
- Inadequate procedures
- Procedures not followed
- Having the wrong person fill a role
- Not assigning enough people to a particular function
- Inadequate technology (for collaboration, production, etc.)
- An insufficient proposal budget
- Poor planning and scheduling
- Insufficient or inaccurate customer knowledge
- Inadequate information about the competition.

Once this list is compiled, it is important to get the perspective of the "splitters." This is because an action-item list, the output of Step Three, should be driven by systemic weaknesses or flaws, not one-time events that are unlikely to occur again. The splitters can identify the unique events. Some examples include:

- The competitor made two acquisitions that added critical capability late in the proposal cycle.
- Important decision-makers in the customer organization were removed from the process due to unforeseeable events after the proposal was submitted.
- A natural disaster, such as a blizzard or a flood, prevented key players in the proposal process from attending orals rehearsals.

No organization can develop processes that anticipate all contingencies, and no organization can afford to go down that road. However, many proposal events reveal systemic flaws, and these form the basis for the action-item list. Although priority is necessarily attached to the events that actually resulted in the loss, other weaknesses or problems can be of equal importance. Resources are finite, and not every flaw can be addressed.

Items on the list can include training, hiring, firing, acquiring new technology, reassigning personnel, and developing new approaches to customer intelligence gathering, to name just a few. A professional must take ownership of the action-item list and, for each action, identify the following:

- What needs to be accomplished
- What the interim steps are
- What the relevant milestones and deadlines are
- How the team will know when the problem has been fixed
- Who will be responsible.

Whoever owns the list needs to schedule regular meetings until all the action items are addressed. Because taking action always demands resources above and beyond what was planned for, senior leadership buy-in and support are critical.

Senior leadership buy-in and support are critical.

Step Four: Let Go and Move On

Conscientious professionals always want to learn more, but the amount of useful knowledge that can be gleaned from revisiting the same ground over again diminishes after a certain point. Strong leaders know when to stop. It will be easier to move on if the analytical work of figuring out what happened and the follow-up work of changing whatever needs improvement are completed. Loose ends make it difficult to take on a new challenge.

This is a good time to make sure that the housekeeping is done. Create any additional proposal copies required for the archives, consolidate and label files, close down Websites or collaborative work spaces, and so forth. Clear out the proposal room, just as the crew starts striking the set the same night of a play's last performance. Small symbolic actions reinforce closure and make it easier to turn to a new page.

Finally, senior managers should recognize the hard work and sacrifices of the team. Losing is rarely the result of intentional error or negligence, and recognition is all the more important when there are no bonus pools or other tangible rewards.

Senior managers should recognize the hard work and sacrifices of the team.

Obstacles and Remedies

Each of the four steps described above is based on logic and common sense: determine what went wrong, and fix it. Why do so few organizations take these steps? It is because there are serious obstacles fighting against them. In effect, proposal and capture teams have to climb steep mountains to accomplish each one.

To understand why these mountains are so high and what has to be done to climb them (as opposed to circumnavigating them), it is useful to examine other arenas in which failure occurs and to see how people and organizations address them. These include the broader business world (Argyris 1990, Baumgard 2005, Bazerman 2002, Cannon 2001, Denrell 2004, Fiske 1984, Garvin 2005, Huber 1996, Janis 1989, Michael 1977, Russo 1990, Sutton 1987, Tavris 2007), health care (Deis, Edmondson 2005, Edmondson 2004, Tucker 2003), the military (Department of the Army, Army ROTC), foreign aid (US Agency for International Development), aviation safety (National Transportation Safety Board), manufacturing (Liker 2003), group dynamics, (Bridges 2003, Ernst 2006) and engineering (Drucker 1985, Petroski 1992, Kelly 2001). Few other situations in business—or in life—are directly comparable to the experience of proposal teams, which operate in winner-take-all situations. Yet, concepts and ideas from these other fields and disciplines have much to offer if they are applied selectively. The fact that these concepts have been studied and tested on larger populations and over a longer period than would be possible in the proposal environment makes them all the more compelling and worthy of our interest.

The experience of professionals in other fields suggests that there are at least eight different reasons why companies do not learn from losing proposals:

1. Time and personnel constraints
2. Fear of exposing errors
3. Focusing on the symptom rather than the disease
4. "Workaround syndrome"
5. Cognitive and psychological biases
6. Focusing on how, rather than why
7. "Analysis paralysis"
8. Staying stuck in the past.

Each obstacle can be overcome once it is acknowledged and understood. Each is explained in brief and followed by a suggested remedy below.

Time and Personnel Constraints

One of the many reasons why so-called lessons-learned exercises turn out to be neither lessons nor learned is logistical and practical: time constraints. Because each opportunity is different, understanding what happened demands attention to detail, and, if time is in short supply, that level of attention will be insufficient. According to Amy Edmondson of Harvard Business School, "conducting an analysis of a failure requires a spirit of inquiry and openness, patience...".

However, most managers are rewarded for decisiveness and efficiency rather than for deep reflection and painstaking analysis (Edmondson, *The Hard Work*, 2005). The fact that failure is an unpleasant topic only increases the likelihood that participants will rush through the analysis. Lack of knowledge and experience are also very real challenges. Because each opportunity has to be seen in context, the details, some of which may be technical, matter. If a corporation assigns whatever senior staff member might be available to conduct the analysis, that individual might not have the requisite knowledge and experience. Root-cause analysis demands objective, rigorous thinking by people who are not afraid to question traditional wisdom. Furthermore, a careful analysis of everything that happened requires contributions from everyone who played a significant role, including the business-development team, the capture team, finance, legal, engineering, and so forth. Time and personnel constraints are intensified by poor documentation. Often the key decision points in a capture and proposal effort are not recorded accurately in the records and have to be recreated based solely on human memory.

How can these constraints be overcome? There is no panacea for a company unwilling to spend the time or assign the appropriate people to learn from mistakes. Time and resource constraints have to be addressed by senior management. Professionals will spend time on activities that are valued implicitly in the corporate culture and explicitly through tangible and intangible rewards. Good records are not difficult to create, and this is one area in which proposal and capture teams can take corrective action that will help in the event of either a loss or a win.

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There needs to be enough acceptance of exposing errors that the facts will come to light without creating a climate where persistent errors are accepted as a matter of course.

Fear of Exposing Errors

A second barrier to exposing the entire history of the opportunity, which is the first step on which all the subsequent ones depend, is the fact that people, reluctant to reveal their mistakes, devise elaborate ways to disguise them (Argyris 1985, Michael and Mirvis 1977, Sutton 1987, Michael 1977). Organizations face a difficult balancing act with respect to accountability. Without clear lines of responsibility, there is little incentive to avoid errors, and few organizations are willing to espouse a policy of tolerating error. However, if accountability and personal responsibility become the basis for assigning blame, a culture of fear and finger-pointing develops and precludes identification of serious problems that need attention (Edmondson 1996). In many organizations, the lessons-learned process after losing a bid becomes an opportunity to assign blame.

The way to overcome a fear of exposing errors is first to recognize that corporations already tolerate some degree of error. Otherwise, everyone who worked on a losing bid would be fired, and all opportunities in the pipeline would carry a 100-percent win probability. But there is a difference between accepting errors implicitly and creating a culture where they come to light in a productive way. There needs to be enough acceptance of exposing errors that the facts will come to light without creating a climate where persistent errors are accepted as a matter of course.

Three concepts from other fields can be adapted to address the fear of exposing errors: (1) the idea of *just culture*, a term used in the medical community to address errors; (2) a methodology for setting boundaries; and (3) the concept of small failures.

Just Culture

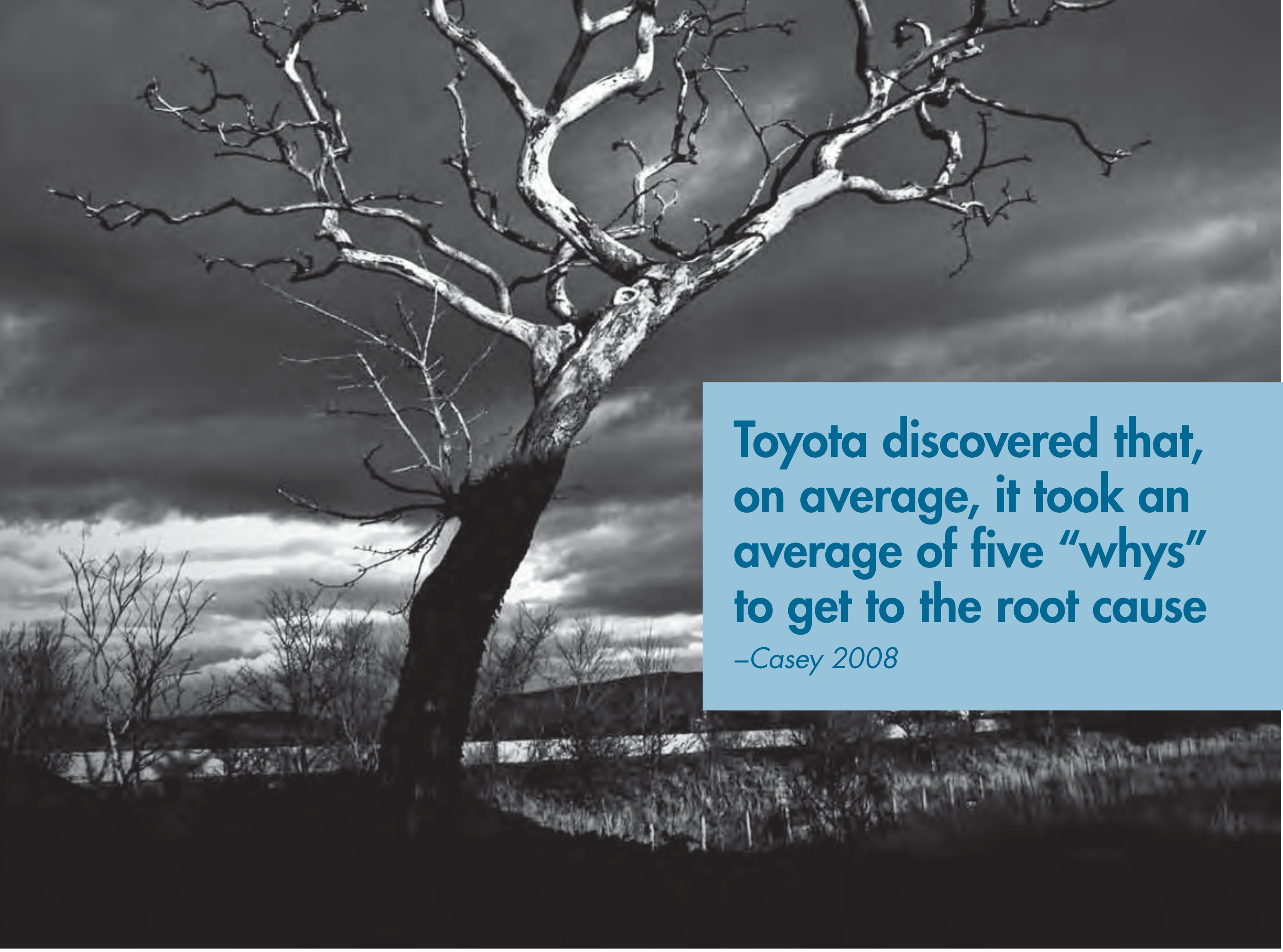
The just culture concept originated in aviation safety and has since been adopted by the medical community. It is a philosophy that "seeks to balance system and individual accountability for patient safety and to base disciplinary action on behavioral choices. . . . A nurse misreads the label on a medicine vial and gives the patient the wrong drug. She is not incompetent, merely human. A just culture recognizes this and attempts to reorganize the system so human errors are trapped before they reach the patient" (Decker 2007).

Just culture classifies different types of errors and addresses them with appropriate responses. In medicine, these classifications are human error, at-risk behavior, and reckless behavior. In the proposal environment, an example of human error is the kind of mistake an author or desktop publisher makes after working too many consecutive hours without enough sleep. Introducing new concepts into a proposal without vetting them through the leadership team is an example of at-risk behavior. And leaving a copy of the proposal in a place where it could be seen by competitors clearly constitutes reckless behavior. By classifying proposal errors, organizations can develop more effective responses instead of assigning blame and applying a standard remedy regardless of the classification or the context.

Setting Boundaries

Setting boundaries follows logically after errors have been classified. These boundaries have the paradoxical effect of reducing fear rather than increasing it. If people do not know where the boundaries are, they will be even more reluctant to reveal the facts about what has happened because they are unsure what is inside and outside the boundary of acceptable conduct. When unacceptable behavior is clearly defined, events that do not fall into that unacceptable category are more likely to come to light during a lessons-learned process. If it is not defined, errors that need to be corrected might remain forever hidden. For this reason, it helps to publicize what constitutes punishable misconduct (Edmondson 2004). In the proposal environment, an obvious example of unacceptable behavior is getting lost on the way to deliver the proposal and failing to call for help. Another is failing to keep a backup copy of the proposal files.

Maintaining a just culture and defining limits provide proposal teams with what they really need in order to learn from mistakes: *a safe place to fail*. Implicitly we accept that there will be mistakes on a proposal. Otherwise there would be no need for quality control and color reviews. That acceptance needs to be made explicit if errors are to be uncovered in time to be fixed, whether during the proposal or before the next bid.



> **Toyota discovered that, on average, it took an average of five "whys" to get to the root cause**
> *–Casey 2008*

Small Failures

Creating a safe place to fail is consistent with the notion that it is more effective to learn from what Sim B. Sitkin, an organizational behavior expert from Duke, has described as "small losses." Sitkin advocates finding small, contained failures or errors and using these as the basis for improving performance. Rather than waiting for a postmortem after the award, teams should constantly look for failure and perform lessons-learned exercises on a smaller scale whenever there are errors that meet one or more of the following conditions:

- They resulted from planned actions
- Their outcomes were uncertain
- Their outcomes were modest in scale
- They resulted from short-duration activities
- They were relevant to the core business and core competency (Sitkin 1996).

In the proposal environment, the concept of small failures is inherent in the color-review process. If proposals were created perfectly the first time around, there would be no need for these reviews. Too often, however, the color-review process is elevated to the status of a large failure after which people assign blame rather than learn lessons. One remedy is to set clear expectations before the review starts and emphasize that the goal of the review is not for the team to come away with a perfect score but rather to identify areas for improvement.

Focusing on the Symptom Rather Than the Disease

Organizations engaged in a postmortem tend to focus on the symptom rather than the disease. If the proposal did not contain information relevant to the customer, it is easy to determine that the cause was an inexperienced proposal manager or proposal writer. In fact, the underlying reason might be that the business development team was never able to get good customer information to pass along to the proposal team. This phenomenon of focusing on the symptom rather than the disease is compellingly examined by Amy Edmondson, who writes, "When only the superficial symptoms of complex problems are addressed, the underlying problem typically remains unsolved, and even can be exacerbated if the solution feeds into a vicious cycle (such as providing food as direct aid, which relieves the starvation but perpetuates the problem of population growth in inhospitable climates)" (Edmondson 1996).

Specific tools for performing root-cause analysis can be applied to get past the symptom and focus on the disease. Here again, the scholarly literature is useful for learning from a proposal loss. The root-cause analysis concept originated in manufacturing and is often referred to as "the five whys" because Toyota discovered that, on average, it took on average of five "whys" to get to the root cause (Casey 2008). Masaaki Imai proposed this approach at Toyota in the 1970s to improve the diagnosis of production problems. It entails continuing to ask why each event occurred until the root cause is identified. The consulting firm *Critical Thinking* defines root-cause analysis as "uncovering how the current problem came into being. . . . You know you are done gathering information when you see the complete picture of how this particular problem came into being and are ready to consider what to do about it" (Critical Thinking).

For example, perhaps the post-loss analysis reveals that the proposed management team was not experienced enough to be credible to the customer. This is the time to ask the first "why." Suppose the answer is, "The top two candidates for the management positions were not available and could not be bid." Then the team would ask the second "why." If the answer is something like, "They could not get approval to get time off from their ongoing contracts," it would be time to ask yet another "why." Suppose the answer to that is, "Their managers did not see the value in their participation in the proposed project when compared with keeping them billable on current work." Now it would be time for one more "why." The answer to that might very well be, "No one from senior management called the supervisors to explain that this was a 'must-win' or offered any assistance in filling the gap that would be created by the candidates' absence." This is a real-world example of a root cause, and it is a problem that can be addressed or avoided the next time. Ironically, many proposals include a detailed description of root-cause analysis, as it is used in the management of information technology resources, but the same teams that developed those very proposals do not use the technique to analyze their own experiences.

The U.S. Army has a detailed manual that prescribes the steps for an after-action review (Department of the Army HQ 1993, Army ROTC), as do other US government agencies (Edmondson *The Hard Work* 2005, National Transportation Safety Board, U.S. Agency for International Development 2006, Deis).

Because of biases that the members of the proposal teams themselves might not recognize, it helps to have an experienced facilitator manage the root-cause process. Moreover, conversations about personalities, work habits, competencies, skills, knowledge, and experience can enter into the root-cause analysis. These are sensitive topics, and the entire exercise can easily degenerate into assigning blame unless there are clearly stated and enforced rules of the road and one or more neutral observers.

The Workaround Syndrome

Proposal professionals become adept at addressing the immediate problems, even to the point of not recognizing whether those problems are related to an underlying root cause. When I worked in an office where the humidity was so high that it warped the paper, I regularly bought paper just before the proposal was printed and kept it at home. After a while, it was just part of the routine, and I stopped seeing it as a problem. This phenomenon is also seen in the hospital environment, where nurses pride themselves on acting independently to find whatever the patient needs rather than taking action to identify, much less fix, underlying organizational problems. A study of one hospital found that, rather than raising questions about their hospital's linen-delivery service, nurses paid for taxis to deliver the laundry when there was no clean linen in the hospital closets (Tucker 2003 p. 60). Inherently valuable qualities in a professional, including commitment to a goal, vigilance, accountability, and independence, can work against identification of areas where the organization could improve (Tucker 2009).

Addressing the workaround syndrome is not inherently difficult once it is recognized. One approach is to create a "parking lot" where people can document their workarounds. This could be a Website or simply a bulletin board. When members of the team have downtime during or between proposals, they can address the underlying problems that resulted in the need for a workaround. The proposal business has peaks and valleys, and virtually everyone has downtime. Workarounds will not get addressed unless there are incentives for team members to use downtime in a productive way.

Cognitive Barriers

Even if an organization has promoted a culture of honesty where mistakes are dealt with openly and fairly, other deep-seated cognitive and psychological tendencies make it extremely difficult to gain a clear understanding of what transpired. One bias that is easy to observe and understand, and has long been studied by psychologists, is cognitive dissonance. When a person's firmly held beliefs are contradicted by actual events, that person tends to not change his or her beliefs but rather to rationalize them and find ways to reinforce them. Reviewing what has happened to us is not "like replaying a tape. Rather . . . it's 'like watching

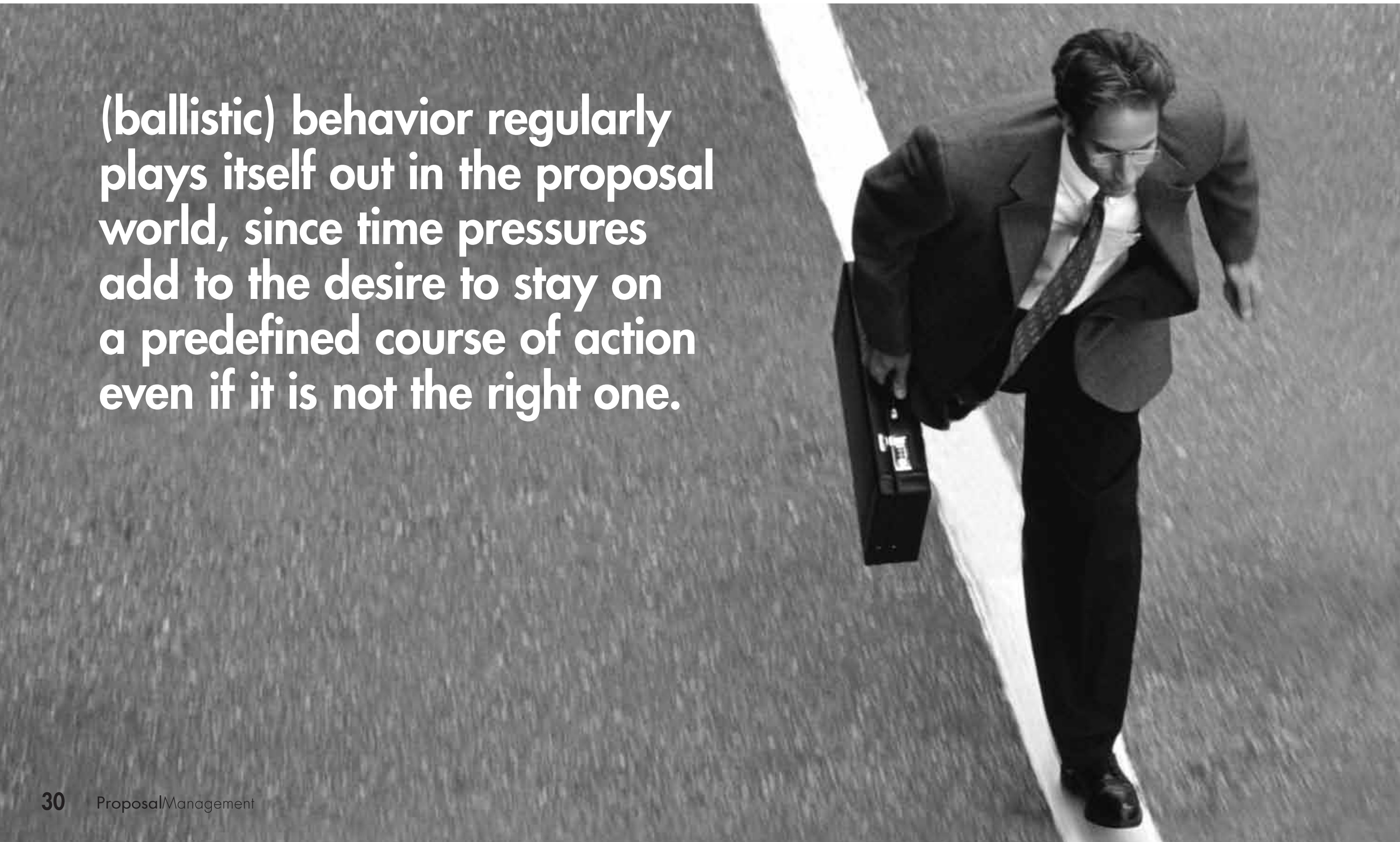
a few unconnected frames of a film and then figuring out what the rest of the scene must have been like. . . . If mistakes were made, memory helps us remember that they were made by someone else'" (Newham 2008, Tavris 2007). Another example is the hindsight bias. Knowing the outcome of an event (we lost) colors our perception of what happened. When an unknown manifests itself as something tangible, it becomes knowledge; before then, it was one of many unforeseen possibilities. In the proposal environment, it is easy to assume that the team should have known things that were perhaps unknowable and unpredictable. It is only in hindsight that a customer's shift in perception appears obvious and inevitable.

Dietrich Dorner uses the term *ballistic behavior* to describe a very human tendency to continue on a predefined course without stopping to examine consequences, just as a cannonball proceeds to its destination without there being any opportunity for us to control its course. Ballistic behavior preserves our sense of competency. However, because our knowledge is always imperfect, "we have to be able to adjust the course of our actions after we have launched them; analyzing the consequences of our behavior is crucial for making these ex-post-facto adjustments" (Dorner 1997). This behavior regularly plays itself out in the proposal world, since time pressures add to the desire to stay on a predefined course of action even if it is not the right one.

Other biases, well documented in the management-science and organizational-development literature, include denial, presumed associations, irretrievability, misconceptions of chance, overconfidence, positive illusions, egocentrism, and the confirmation trap. Each of these can contribute to a misperception and misrepresentation of what actually occurred (Bazerman 2002). Although these biases have traditionally been studied from a behavioral perspective, neuroscientists, through the use of magnetic resonance imaging, are now starting to understand the parts of the brain that contribute to decision-making. The physiological research is certain to offer more effective ways of understanding these cognitive processes.

Biases and preconceptions can preclude an accurate depiction of the actual proposal events. Everyone has attended a meeting or observed an event only to find later that their own recollection of the same occurrence differs markedly from that of other attendees. The high stakes in a proposal environment, when jobs, revenues, careers, promotions, and the financial future of the organization may hang in the balance, undoubtedly intensify the likelihood that one or more of these biases will color the analysis.

What can proposal teams do to compensate for cognitive errors? There is no simple remedy for overcoming thought patterns that are deeply established in our subconscious. Awareness is the first step. Recognition of the cognitive and psychological biases that color our judgment can minimize their influence. Involving neutral (but experienced and knowledgeable) observers in the post-loss process can also partially offset many of the analytical biases that result in incorrect conclusions. Thus, whenever possible, it is advisable to have a qualified professional from outside the organization complete an independent audit of all the proposal documents and conduct interviews with participants. Although no account of what transpired will ever be completely



free of bias, an outside observer is less likely to share the biases and preconceptions of the proposal team and the managers inside the organization. Of interest to organizations truly committed to learning is the formal "metacognition" process, which is aimed at educating decision-makers to improve their ability to recognize and correct their biases. Another approach is to ensure that key players on the team get regular feedback, a concept consistent with the notion of small losses. My own practice entails asking one or two people on the team to comment and critique my performance along the way. At first, I do not always get a lot of comment or criticism, but, if I keep asking, I do eventually receive feedback about my own blind spots, biases, and preconceptions.

Focusing on How, Rather than Why

It is very tempting to create new processes after a loss with the idea that the right process will fix all problems. The proposal business is, in fact, notorious for its worship of process, often at the expense of everything else. It is worth noting that the management-science literature shows that learning organizations tend to embrace principles rather than focus exclusively on detailed processes. Both principles and processes are important, but principles are particularly relevant to the competitive proposal environment because each deal is unique in its requirements, staffing, technology, customer preferences, and pricing, and it is unlikely that detailed processes can cover all the possible forms that a deal might take. In addition, the process without the principle is the "how" without the "why." It is much easier to gain support and promote compliance when people understand the reasons behind what they are being asked to do. Principles enable a culture that promotes learning and improving. As Jeffrey Pfeffer and Robert Sutton note in *The Knowing-Doing Gap*, "Operating on . . . a set of core values and an underlying philosophy permits . . . organizations to avoid the problem of becoming stuck in the past or mired in ineffective ways of doing things just because they have done it that way before" (Pfeffer 2000).

On my proposal teams, we often work together to create a list of principles. Honesty is a core value for me, and it operates at many different levels. It entails honesty in my communication with others, honesty in the assessment of the proposal by the review teams, and honesty in the proposal document itself, where we do not ever make statements we know to be false. Honesty is equally important in developing the price proposal. The estimates have to reflect an honest judgment about what it will take to accomplish the work. Once people understand this principle, the processes (e.g., the requirement for a detailed basis of estimate) start to make sense. Such principles may not be universally liked, but they cease to appear arbitrary and meaningless.

Analysis Paralysis

Walt Disney was well known for saying, "The best way to get going is to stop talking and begin doing." Principles come to life through actions. Errors and shortcomings discovered after a loss can only be fixed through action, and action means activity, not talking or writing or briefing. The tendency to fall prey to "analysis paralysis" is particularly prevalent in knowledge-intensive industries, where senior managers are often well-educated, intelligent, and inclined to over-think, over-model, over-brief, and over-talk without ever taking action. Learning by doing is proven more effective than any other teaching method for perfecting job-related skills. As Pfeffer notes, "Both the evidence and the logic seem clear: Knowing by doing develops a deeper and more profound level of knowledge and virtually by definition eliminates the knowing-doing gap" (Pfeffer 2000). Anyone who has taken proposal courses has experienced the difference between classroom learning and the reality of a live proposal environment, so learning by doing is imperative in our business. Nevertheless, it poses certain challenges. Apprenticeships, mentoring, and shadowing can be expensive. Trial and error is not an acceptable approach when time and budgets are constrained, as they tend to be during a proposal. This means that organizations have to find ways to take action, to test-drive new approaches, and to effect organizational and personnel changes before the next big bid and before time constraints make it difficult to contemplate or implement change. The implications are clear: An organization that goes from one proposal to another without taking time to implement corrective actions is destined to continue repeating the same mistakes.

Staying Stuck in the Past

Some teams have trouble letting go. Since organizations are reluctant to examine losses in detail in the first place, it seems as though moving on would be the easiest part of the cycle. Why not rush to get past something that is so unpleasant? Oddly, people often stay stuck, even in counterproductive and undesirable places. In his analysis of the creative process, Robert Fritz notes, "Shortly before prisoners are released, they often experience sleepless nights, anxiety, loss of appetite, and a host of other unpleasant feelings. This experience comes, paradoxically, after years of looking forward to the day when they will be released" (Fritz 1984). Some people and some groups have trouble bringing events to closure. Several guidelines are helpful here.

First, as noted earlier, it is easier to move on if the analytical work and the resulting action plans are complete. In other words, finish the first three steps. Second, the work must be recognized as complete. It might even be necessary to mark completion formally with a banner, a statement, a short ceremony, or, at the very least, a message to all the participants. Time pressures and a lack of formality and ritual in the business world (and in life more generally) make it difficult to treat important milestones with the respect they deserve.

Summary of Obstacles and Remedies

This list of obstacles, as daunting as it sounds, is not exhaustive, and further research in other disciplines will certainly uncover more challenges. Techniques identified in this article are summarized in Table 1.

A Code of Conduct

Anyone can be magnanimous and gracious after a big win. It takes an extraordinary individual to demonstrate dignity and grace after a big loss. This is what separates the leaders from the managers. The leaders in other fields, such as Coach K, adhere to

Barrier	Suggested Strategies	Likely to Occur During Which of the Four Steps?
Time and personnel constraints	• Get leadership engaged. • Keep accurate records. • Recognize the time and cost involved up front. • Assign the best people, not the available people.	One and Two
Fear of exposing errors	• Create a safe place to fail. • Understand and apply the concept of small failures. • Clearly define unacceptable behavior.	One and Two
Focusing on the symptom rather than the disease	• Apply root-cause analysis tools. • Use professional facilitators.	One and Two
Workaround syndrome	• Create a "parking lot" and return to it after the event.	One and Two
Cognitive barriers	• Educate for awareness. • Implement metacognition processes. • Ask for feedback along the way.	One and Two
Focusing on how, not why	• Articulate principles. • Make sure processes flow from principles.	Three
Analysis paralysis	• Learn by doing. • Establish apprenticeships. • Encourage shadowing.	Three
Staying stuck in the past	• Finish the work. • Use ceremony. • Embrace formality. • Recognize participants.	Four

Table 1: Summary of Obstacles and Remedies

a code. We know the right code of conduct when we see it, but one has never been articulated for proposal losses. Since losing is inevitable, it makes sense to establish a formal code. My own first draft of such a code consists of the following guidelines:

- Use an elevated level of courtesy and formality in all written and verbal communications, especially during the debrief.
- Notify everyone promptly of the loss, including all subcontractors and support personnel.
- Provide as much information as appropriate about the reason for the loss as stated by the customer.
- Initiate the four-step process immediately, and let the team and senior management know what is going on at each step.
- Accept responsibility publicly for errors that have been accurately identified.
- Get back in the fight. Soon.

Conclusion

Losing proposals are a fact, a reality of competition. The science about the potential to learn from losing is equally clear: Failures are more effective teachers than successes. The inevitability of proposal losses provides regular opportunities to grow and learn, opportunities that are often squandered. No silver bullets exist to reduce the amount of time, attention, energy, and skill that it takes to complete a true lessons-learned process. Commitment to this endeavor has to come from the top, and there are mountains of resistance to be climbed. However, like many difficult undertakings, the rewards are commensurate with the investment required.

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Mike Yorkowski and Clay Brown provided valuable comments on earlier drafts of this article; Brenda Crowley of the Falls Church Public Library was tireless in her retrieval of important journal articles. To all, the author's thanks.

Biases and preconceptions can preclude an accurate depiction of the actual proposal events.

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LET THEM

Michele Rochon

Proposal Process for Your Starving Masses

Can you use baked goods to improve your proposal teamwork? While it did not work for Marie Antoinette, it may work for you.

This tasty and fun team-building exercise is especially for proposal writers and managers. As an unconventional technique for establishing a process in an "ad hoc" business development environment, it involves a process launch session using a cake-baking competition as an analogy for proposal development. Participants compare the steps of baking a cake to producing a winning proposal. The comparison and competition enhance learning and the emotional experience increases learning retention. The entertainment value and participatory nature of the exercise supports the forming of consensus for a new proposal process.

EAT CAKE

Taking a complex sales process from “ad hoc” to “repeatable and quality controlled” is sometimes said to be the most daunting step on the road to full optimization.

At “ad hoc” the seller is, at least formally, unsystematic. The line of attack relies on oral tradition upheld by the hands-on principals and veterans who have cultivated a long history of success, failure, and techniques tried, then kept or abandoned. This is small business nimbleness at its best. But we all know that growth quickly shakes that nimble foundation and demands the elastic reinforcement of processes to stay standing.

When at “repeatable and quality-controlled,” the seller begins to respond systematically to customer need. Quality control starts to show faint glimmers of self-sustainability and the work environment, signs of a truly repeatable capture procedure. The jump seems undemanding, but personnel from companies who have gone through it report that it rarely proves that way in reality.

Process Revolution

The challenge lies largely in the cultural shift the seller’s organization must make. The effort is usually spearheaded by a minority and slowed by a majority that privately doubts its value. This group resists the long process of habituation and prolongs it by leaving less time for proposals and defaulting to “ad hoc” to get them out the door.

What if we had a quicker way to habituate process? What if it was actually fun and created among staff permanent, pleasant associations with the steps? What if it leveled the playing field for senior and intermediate proposal writers and their production support, and empowered them all?

Let Them Eat Cake

Popular history records that Marie Antoinette made her mark by over-simplifying a complex problem, proving herself so insulated from the plight of the masses that she could not grasp the idea of their starvation.

Picture the Process Manager, the Senior Proposal Manager, or whatever role might be at the helm of organizational change in a growing corporation. This person is assailed daily with reality. People hate change. The new processes are unpopular, the paperwork dismissed as redundant. Passive aggressive behavior abounds. The road is long and uphill. This regent is painfully aware of the plight, perhaps too aware. What this needs is some over-simplification.

Proposal Cake: A New Recipe

Send out a notice of a process launch session titled, "Proposal Cake: A New Recipe." Guard secrecy carefully. Ask participants to bring an apron, a notebook, and a sense of humor.

On the boardroom table provide mixing bowls, whisks, spatulas, spoons, and cake pans. Flour, sugar, eggs, butter, berries, and chocolate can line the counter at the back wall.

Form the Teams

Break the group into proposal teams. A group of 20 with 4 groups of 5 is recommended; anything larger is unmanageable, anything smaller is not as textured with competitive spirit or a group atmosphere.

Have teams identify from among their members a proposal manager, production support person, or any other roles your organization might recognize as part of proposal development. If there are more members, the teams can add more writers, production assistants, or a director, who would be a senior principal or VP providing strategic peer review.

Have participants choose a role that differs from the one they normally fulfill. This gives them the chance to experience the roles of other proposal team contributors.

With the teams formed, draw attention to a series of prepared flip charts, the first of which is titled, "Form your Proposal Team." After forming proposal cake teams, participants discuss the roles, tasks, decisions, and tools that characterize this step in the proposal process. The facilitator records the group's comments on the flipcharts. This participatory technique can help create consensus for change in the early stages when it really counts. See the Steps and Rules of the Game for further detail.

Interview the Judges (um…Customers)

Step 2 includes interviewing the cake judges, also known as the proposal evaluators. The judges should be briefed beforehand on how a customer might evaluate a proposal and asked to evaluate cakes similarly. They should come ready with evaluation criteria to save time. Cakes can be judged on flavor and presentation. Teams can be judged on teamwork, role fulfillment, and cleanliness or efficiency of their operation.

The judge interview should model a customer interview. The challenge for the teams becomes making the best use of the time (which should be limited) with each judge and asking the questions that will obtain the right information about the judges' tastes in cake.

Then discuss and record critical success factors for an effective customer interview process on the flip chart.

Choose a Recipe

At Step 3 the groups choose their cake recipe. Allow flexibility in this step so that the teams can experience the many layers of group decision-making. You can provide some recipes and the ingredients for them, but you can also give them the option of finding other recipes to spice up the decision process.

Inspire Strategy

Do not allow any teams to use the same recipe. This restriction will encourage strategic thinking, which is the beauty of the exercise. Judges can be encouraged to assert their own tastes in the process so the choice of recipe draws inspiration from the interview process and becomes a split-second decision requiring strategy. This demonstrates the importance of understanding customer needs and shows how acting strategically can be urgent.

This may turn out to be the first breakthrough moment when teams relate cake-baking to proposal development.

From here the group can populate the flipcharts for the next three steps in proposal development: (1) choose the project (Go/No Go), (2) define your offer, and (3) develop a win strategy. The facilitator should encourage the teams to absorb the judges' preferences and adjust their approach to position themselves for a win. Watch as competitiveness and ideas begin to flow.

Preparing the cake batter is when the real fun begins. Give them only 15 minutes so the teams feel the pressure to organize fast. Require them to "buy" their ingredients and record costs so that they can price their cakes to make a profit, also a critical step in the proposal process. Consider running Red Team Reviews where a tasting is conducted with impartial reviewers.

Baking and Wrap-up

If you can bake the cakes in your office, it reduces time and logistics. A nearby bakery might be willing to help. If you are working in a hotel conference room, the hotel staff might be equipped to help. If any participants live nearby, they can also be recruited to volunteer their home ovens. Ovens can also be rented from caterers or appliance suppliers, but they will have to be set up by someone with some electrical know-how.

The 30 to 45 minutes it will take for the cakes to bake is perfect for wrapping up the proposal process discussion. Identify the final steps, including: (1) planning the proposal, (2) writing the proposal, (3) reviewing and revising the proposal, (4) pricing, and (5) conducting a proposal debrief.

The Use of Analogy in Adult Learning

In the ideal Proposal Cake session, you will see teams managing their win through conditioning the judges, careful pricing, and extras in presentation (icing, whipped cream, candies, or a glass of milk). The exercise by nature encourages the forming of analogy, something that has been used in adult learning since the beginning of time, from parables to case studies. With analogy there is a *source* and a *target*. By recognizing similarities between them, we better understand and assimilate learning of the target. In this case, the cake baking is the source, and proposals are the target.

By compressing the process into approximately two hours, the technique produces an interesting effect. Participants see a distilled flow of work and begin to understand what value each step has, from planning an effective customer interview to a successful Red Team review. They witness decision-making, planning, and execution in condensed terms along the same unbroken progression, thus learning how tasks flow into each other to produce a predictable result. Understandably, this demystifies the need for proposal process standards and reduces the fear of using them.

Entertainment, Emotions, and Memory

The entertainment value cannot be understated. The friendly competition with colleagues creates an emotional experience that amplifies learning potential and retention. Enthusiasm and excitement will build at about the same time the teams begin interviewing their judges and feeling pressured to manage their win. As the facilitator you must keep this momentum going. The more laughter the better. This makes the steps more memorable and creates pleasant mental associations a dry flow chart could never produce. After a session like this, do not be surprised if you catch people smiling when planning proposals. They are remembering the fun they had baking "Proposal Cake."

"Memorable" is a key word in this technique. Looking back on our professional lives, we can recall few details of our formal learning experiences. An emotional experience solidifies memories inside our minds. In this case we are creating a positive memory, for which your "starving masses" will most definitely thank you.

The experience will prove highly valuable for both senior and junior participants. The veterans will see things in a new light; the young-uns will have the mysteries unraveled in a fun and humorous way.

Fun is the Name of the Game

Your Proposal Cake facilitator should be prepared to respond to challenges on the fly. Depending on the number of people participating and the details of your session, you may have to provide extensions in the time limits. The pressure of time and its similarities to the proposal process will be felt even if you make these concessions. You do not want to spoil the fun by eliminating any of the teams for missing the deadline. Fun is truly the name of the game.

Have the judges provide a public debrief of their award decision, complete with each team's performance according to their evaluation criteria. This can coincide with an entertaining wrap-up celebration and dining on the spoils at the close of the business day.

The Process Initiative Guillotine

In the path to business development maturity, a company must formalize its proposal process (and yes, must also endure change). How effortlessly the change is adopted and how well it is received are functions of specific learning efforts within individual business units.

Why not make it fun? Your people need some good news for a change. Try letting them eat cake. It might actually spare your flowchart the guillotine, where dry process initiatives go to die.

The Steps and Rules of the Game Welcome

(15 minutes)

RULES:

- Form teams
- On your team you will have directors, department and BD managers, writers, and production assistants
- Each team will be judged by four judges on things like teamwork, role play, efficiency in process, cleanliness of your work station, and the quality of the end product
- Your objective: to bake a cake that the judges will select as the winner (not to bake what you think is a good cake)

Step 1 – Form your Teams

(5 minutes)

RULES:

Identify roles. These could include directors, department or proposal managers, writers, and production assistants, whatever is appropriate for and recognized in your operation. Instructions for each step below show how each role should have different duties in the baking process.

Step 2 – Interview the Judges

(22 minutes)

(5 minutes to prepare, 12 minutes to interview, 5 minutes to share results with the team)

RULES:

- Directors – suggest interview questions to your team
- Managers – take suggestions from your team on questions to ask, conduct the interview, and share the results with your team
- Proposal Managers – lead the discussion on interview planning and support the Manager at the interview
- Writers – suggest questions to ask
- Production assistants – record the questions and answers

Step 3 – Choose your Cake Recipe

(10 minutes)

RULES:

- No two teams can use the same recipe
- You can modify recipes or even use a different recipe not provided in the recipe package, but you are still under the same time limits
- You can use ingredients or tools not provided here, but remember the time limits
- You all have the same length of time to prepare your cake for baking—15 minutes
- Directors - provide strategic direction for a win strategy
- Managers - provide strategic direction for a win strategy
- Proposal manager - lead the discussion and encourage participation and a timely decision
- Writers - contribute to the discussion
- Production assistants - record the discussion, and make sure you have the right ingredients and tools

Step 4 – Prepare your Cake Batter

15 minutes

RULES:

- Directors – provide suggestions for baking a better cake based on the recipe and what you know about the judges
- Managers – lead your team through the process and decide who does what
- Proposal Managers – Make sure the team is doing everything according to the recipe and judges' preferences, and make sure people are doing their jobs at the right time
- Writers – mix, chop, whisk, stir, pour, grease the pan, etc.
- Production assistants – measure the ingredients; manage clean up

friendly competition with colleagues creates an emotional experience that amplifies learning potential and retention

Step 5 – Taste your Cake Batter (Review)
5 minutes

RULES:
- Directors – decide whether the cake should be submitted to the judges or not, suggest changes
- Managers – suggest changes
- Proposal Managers – make sure changes are made within the 5 minute time limit
- Writers – make the changes
- Production assistants – help with the changes, manage clean up

Step 6 – Price your Cake
5 minutes

RULES:
- Directors and Managers – make sure the team recovers costs and makes a profit
- BD Managers – lead the pricing process
- Writers – do nothing
- Admin Assistants – record the pricing structure

Step 7 – Bake your Cake
5 minutes

RULES:
- Proposal Managers – identify someone to bake the cake
- Writers – do nothing unless you are delivering
- Production Assistants – package the cake for delivery and baking, make sure it is baked properly, and present to judges

Step 8 – Wrap Up
30-45 minutes

RULES:
- Reflection and Lessons Learned
- Teamwork
- Roles
- How do you think your cake is going to perform?
- Judges debrief
- Enjoy the cakes!

Author Bio

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Proposal Software Swiss Army Knife

By Beth Wingate, AF.APMP, APMP International Director of Education

Doing a Proposal? There is an App for that.

Most of us have owned or coveted one of the famous red Swiss Army knives at one point in our lives. Over the years, the many versions of the knives that have shown up in my Christmas stocking have ranged from a huge 50-plus-blade that needs its own rolling case to a micro-fit-in-my-evening-bag size and everywhere in between. Last year when my daughter expressed a desire for one, I opened a drawer and said, "Take your pick! Grab one that has the tools you need in a size that is comfortable to carry."

I could say the same thing about the software applications I have collected over the years to make the job of preparing for, developing, and getting winning proposals out the door easier, more efficient, less stressful, and in some cases—more fun!

My favorite programs and tools—many of which I have used for years through multiple updates—are listed and described below. Some are fairly new additions to my "Proposal Swiss Army Knife," and I have attributed those recommended by APMP members. All are suitable for anyone from small, one-person proposal operations to large, multinational corporations with "casts of thousands." Unlike proposal-specific packages like Privia, Sant, Meridian, and PMAPS, each app listed below fits niche requirements at various stages in the proposal-development lifecycle, from pre-RFP through proposal delivery. Many are free or, at minimum, have fully functional demos so you can evaluate them for your particular needs. I encourage you to "kick the tires" of any application that interests you.

The latest major addition to my Proposal Swiss Army Knife is my new Apple iPad (64GB, 3G). I am absolutely enamored with it and have already spent days, nights, and weekends demoing apps and figuring out ways to use it to support proposal development and my APMP work. Sleep? Who needs sleep? There are so many cool apps to research, add, and test! I have added a column to my spreadsheet listing comparable iPad apps that I have discovered and tested successfully along with notes about which of my favorite online tools work well already on the iPad. I have also added a list of my favorite iPad apps so far. However, while developers are transforming many PC-based applications into apps that you can purchase for the iPad, iPad apps do not run on PCs.

Feel free to email me with questions about how I use these PC and iPad applications or with suggestions for additional apps that you find particularly useful in your Proposal Swiss Army Knife. I will update this list frequently on my Website (www.LohfeldConsulting.com) and provide additional information and recommendations in upcoming issues of APMP's *Journal* and *Perspective*.

Product	Vendor	Cost	Similar Tools *(iPad Apps in Italics)*
Graphics Development			
Do-It-Yourself Billion Dollar Graphics	Mike Parkinson http://www.billiondollargraphics.com	Book – $49.95 Website has Free and Pay Content	
Dia Diagram Editor for Windows	http://dia-installer.de	Free Download	Open Office Draw Imagination Cubed *PhotoPad by Zagg* *ColorSplash by Pocket Pixels Inc.* *SketchBook Pro by Autodesk Inc.* *Qvik Sketch Pro by Qvik* *Sketch Me! by Bluebear*
GE Imagination Cubed Online Whiteboard	General Electric Company http://www.imaginationcubed.com	Free–Web only	
Gantt Project	http://www.ganttproject.biz	Free Download	MS Project
Google Earth	Google http://www.google.com/earth/index.html	Free Download w/ Pay Content	
Periodic Table of Visualization Methods	www.Visual-Literacy.org http://www.visual-literacy.org/periodic_table/periodic_table.html	Free–Web only	
Wordle	IBM http://www.wordle.net	Free–Web only	
Graphics Development – Color Palette			
ColorSchemer and ColorPix	ColorSchemer http://www.colorschemer.com	Free and Pay Versions	*Palettes by Rick Maddy, (iPhone app)* *Vibrant by Tobias Cohen* *myPANTONE X-Ref by PANTONE*
Kuler	Adobe http://kuler.adobe.com	Free–Web only	
Graphics Development – Screen Capture			
SnagIt 10	TechSmith http://www.techsmith.com/screencapture.asp	$49.95/person (free 30-day trial)	*iPad and iPhone screen capture by holding home and power button for 4 seconds*
Snipping Tool	Microsoft	Free, Built into Microsoft Windows OS	
Mind Mapping			
Freemind	Christian Foltin http://sourceforge.net/projects/freemind	Free	*iThoughts HD* iMindMap Inspiration Compendium Freeplane XMind
Mind Manager	Mindjet http://www.mindjet.com/products/mindmanager-9-win/overview	$349/person (free 30-day trial)	
Online Collaboration			
GE Imagination Cubed Online Whiteboard	General Electric Company http://www.imaginationcubed.com	Free–Web only	
Goto Meeting	Citrix Online, LLC http://www.gotomeeting.com	$49.00/month $468.00/year (free 30-day trial)	WebEx DimDim (Skype apps available on multiple platforms) (GoToMeeting, free, participant apps only
Skype	Skype http://www.skype.com	Free and Pay Service Available	

Product	Vendor	Cost	Similar Tools *(iPad Apps in Italics)*
Writing			
Acronym Finder	http://www.acronymfinder.com	Free	
AcroWizard 2.1	Anvil Logic http://www.anvillogic.com/products	$79.99/person (free trial version)	
Computer Desktop Encyclopedia	The Computer Language Company Inc. http://www.computerlanguage.com	$10/year Web-based *$4.99 iPod Touch/iPhone* (free trial version)	AP StyleBook Online
Chicago Manual of Style	The University of Chicago Press http://www.chicagomanualofstyle.org	$35/year for a 1-year individual subscription $65 for paperback	
Google Translate	Google http://translate.google.com	Free	Babelfish
Philips 660 Digital Voice Tracer (with Nuance v10)	Philips http://www.philips.com Nuance http://www.nuance.com	$140 – Recorder and Dragon v10 $199.99 - $299.99 – Dragon v11 software	
Writing – Dictionary			
DoD Dictionary of Military Terms	Department of Defense http://www.dtic.mil/doctrine/dod_dictionary	Free	U.S. Military Acronyms and Abbreviations by Inner Four Military Dictionary by Inner Four
The Free Dictionary	Farlex http://www.thefreedictionary.com/dictionary.htm	Free	
Merriam-Webster Dictionary	Encyclopedia Britannica Company http://www.merriam-webster.com	Free online (abrdiged) $29.95/year (unabridged) $25 hardback with CD	
PDF Conversion			
ABBYY PDF Transformer 3.0	ABBYY http://pdftransformer.abbyy.com	$79.99/person (free 15-day/ 50-page trial)	
Primo PDF	Nitro PDF Software http://www.primopdf.com	Free (Nitro Pro $84.99)	*Pages* *iAnnotate PDF by Aji*
Additional Resources			
Dogpile	dogpile http://www.dogpile.com	Free	Mamma SurfWax WebCrawler metacrawler search.com ICEROCKET.com
dtSearch	dtSearch http://www.dtsearch.com	$199/seat (discounts for multiple licenses) $999/single server $2,500/3-server pack	ISYS Personal Edition Google Desktop Windows Search 4.0
Life Hacker	Gawker Media http://www.lifehacker.com	Free	
Reader Digital Book	Sony http://www.sonystyle.com (search “reader”)	$129.99 - $299.99	Nook $149 - $249 Kindle $139 - $189 iPad $499 - $829
What Time Is It	What Time Is It http://whattimeisit.com	Free	*Multiple Apps Avialable* Time Zone Converter The World Clock

Graphics Development

Do-It-Yourself Billion Dollar Graphics

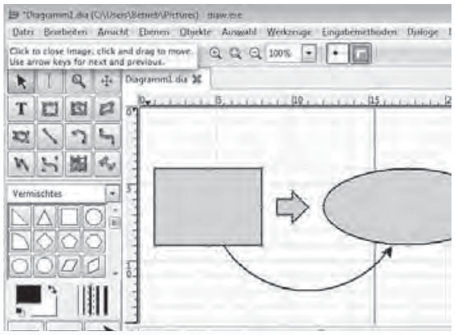
I use this "free library of business and information visual solutions" to explore potential graphics types with my proposal teams. Instead of trying to sketch out a concept, I pull up this Website and click on any of 50 different graphic types (e.g., puzzle, dashboard, funnel, or bridge graphics) to see several examples of that type. My team can point to the type of graphic they want to develop, and we can either purchase the template or develop our own from scratch (depending on the team's graphical abilities!).

Billion Dollar Graphics,
www.billiondollargraphics.com/businessgraphiclibrary.html

Cost: Book – $49.95
Website has Free and Pay Content

Similar Tools:

- Information design article on Wikipedia (http://en.wikipedia.org/wiki/Information_graphics) - many links to graphics types, other articles
- Edward Tufte's Website, www.edwardtufte.com/tufte/



Dia Diagram Editor for Windows

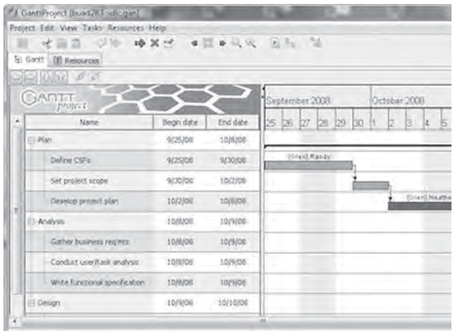
You can use Dia to draw simple structured diagrams (free versus $559 for MS Visio Professional.) While not as fluid and powerful as MS Visio, it is a nice little program that you could use in a pinch in conjunction with a GoToMeeting/WebEx type of application to develop graphics collaboratively with someone in another city versus traveling—especially useful during simple storyboard graphics development. The program includes 30 symbol libraries and supports multiple layers. Note: Dia cannot open MS Visio diagrams and cannot save in HTML.

Open Source
http://dia-installer.de/index_en.html

Cost: free

Similar Tools:

- PhotoPad by Zagg – Free
- ColorSplash by Pocket Pixels Inc. – Free SketchBook Pro by Autodesk Inc., $3.99, "professional-grade paint and drawing app" that uses the same paint engine as its desktop counterpart. Supports layers and can export as a PSD file.
- Qvik Sketch Pro by Qvik, – $.99
- Sketch Me! By Bluebear – Free



Gantt Project

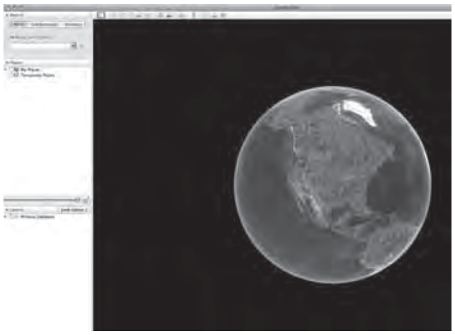
GanttProject is a cross-platform desktop tool for project scheduling and management (poor man's MS Project). It runs on Windows, Linux, and MacOSX, and is open source. You can create MS Project-compatible project plans, work breakdown structures (WBS), draw dependencies, define milestones, assign resources to tasks, create Gantt and PERT charts, and export as PNG images, spreadsheets, and MS Project-compatible output. You can also generate PDF and HTML reports.

I find it very handy to open MS Project files and manipulate them without spending a fortune to put MS Project on all three of my laptops. I can also use this free program to create detailed proposal schedules pre-RFP and then update them automatically with "real" dates once the RFP arrives. Suggested by: Dick Eassom, APMP

GanttProject
(collaborative development effort)
www.ganttproject.biz

Cost: free

- iPad Apps: Have not yet found a project management app for iPad.
- Templates: many project templates available online that you could import
- Similar PC Tools: MS Project



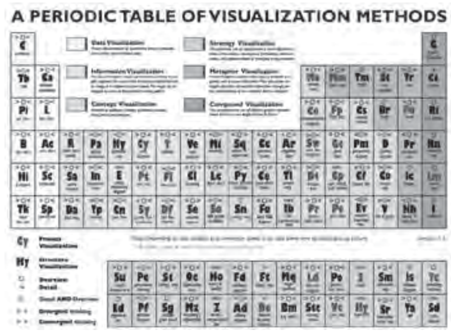
Google Earth

GoogleEarth is a great tool for getting views of where work you are proposing is going to be done. It lets you view satellite imagery, maps, terrain, and 3D buildings. You can take screen shots and use them in your proposals or other materials. I also use the program to do reconnaissance before new consulting engagements or meetings in other cities to locate restaurants, shops, and interesting places surrounding where I will be working or meeting.

Google
http://earth.google.com
Cost: free

Similar Tools:

- iPad Apps: GoogleEarth, free, iPad-specific version works wonderfully!
- Similar PC Tools: NASA World Wind, free, (http://worldwind.arc.nasa.gov/download.html)



Periodic Table of Visualization Methods

VisualLiteracy.org offers e-learning tutorials on visualization for communication, engineering, and business. The Periodic Table of Visualization Methods graphically shows 100 different data representation formats.

It is a great tool to use with your proposal teams during solutioning sessions, storyboarding, and graphics development to show folks what types of graphics are "out there" and what kinds of information you can show using the various graphics types.

I also encourage you to get a login set up for this site and to go through the various demos and tutorials available to improve your visual-literacy skills.

Visual-Literacy.org, www.visual-literacy.org, www.visual-literacy.org/periodic_table/periodic_table.html
Cost: free

Wordle

Wordle generates "word clouds" online (also known as weighted lists) using text that you copy and paste into the application. Wordle's clouds make words that appear more frequently in your source text bigger in relation to other words.

The Website allows you to change font styles, colors, and layouts. You can tweak your clouds with different fonts, layouts, and color schemes. After you create a word cloud, you can print it, post it online, or take a screenshot using a tool like Snagit and then save it or copy it into another document.

Proposal uses: See how many times particular words appear in an RFP or proposal. Quickly check to see if a proposal section is "client-centric" and "win-theme centric" or "you-centric." You can also see an exact count of the various words in your documents—this could be rather handy in some circumstances.

You can print and post the Wordles for folks to see "improvements" over time by section or the proposal as a whole.

You can develop graphics using this technology—could get pretty creative depending on your industry and clients!

Suggested by: Amy Barden, NCA Chapter Templates: Examples provided online. Can save your favorites to share online.

Jonathan Feinberg
www.wordle.net
Cost: free

Color Pix

ColorPix is a useful little color picker that analyzes the color under your mouse cursor and transforms it into a number of color formats (including RGB, HEX, HSB, CMYK). I use it to determine the color formulas for specific colors used in client/agency logos or graphics and then develop complementary color palettes using ColorSchemer or Adobe Kuler (reviewed below).

Color Schemer
www.colorschemer.com/colorpix_info.php

Cost: free

Similar Tools:

- Palettes by Rick Maddy, (iPhone app that works on iPad), free demo (10x use of pro version before app reverts to "Lite" version), $5.99 for basic and $9.99 for pro version, creates and maintains color palettes from images, camera, Website, or color scheme. Imports/exports palettes to Photoshop and other apps. Has RGB, HSV, HSL, CMYK, and Gray scale sliders.
- Vibrant by Tobias Cohen, $.99, iPhone app that lets you take a photo with your phone an d then select a color and use the color wheel to save the color in a palette. View colors as RGB, HSL, and HTML code.
- myPANTONE X-Ref by PANTONE, $1.99, pick a Pantone color and find closest matches from other PANTONE libraries or use an RGB, HTML, or CMYK color value and find the closest PANTONE color.

Color Schemer

I use this tool to develop color schemes for proposals, artwork, marketing pieces, and presentations. I start with a "specific color" I determine using ColorPix and then quickly develop a whole color palette around that color. Next, I use SnagIt screen shot application (or another screen shot application) to capture the color palette and copy it into another document or print it for future reference. I also use the application to play around until I develop a color scheme I like. I like how I can lighten or darken a color scheme by simply pushing a button!

Color Schemer
www.colorschemer.com/online.html

Cost: free

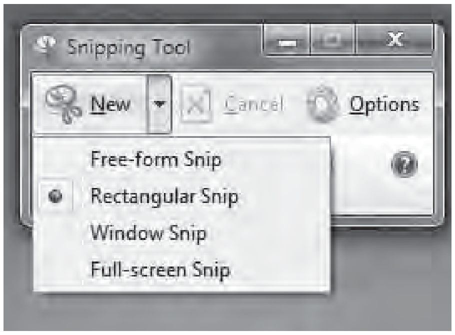
Kuler

I use Adobe Kuler for developing color schemes for proposals, artwork, marketing pieces, and presentations. I can see and use color palettes developed and posted by other uses online, and I can use them "as is" or as a starting point and refine the scheme for my purposes. I take screen shots using Snagit and then use the color scheme as mentioned in my ColorSchemer review.

Adobe
http://kuler.adobe.com/#themes/rating?time=30

Cost: free

Screen Capture



SnagIt 10

This has quickly become one of my all-time favorite programs! This screen-capture utility enables you to capture anything you see on the screen and then edit the images and apply a number of useful effects, including cutting out content that you do not need from the middle of images and combining screen captures.

You can insert captured images (and text) into other applications and you can use the image capture library to organize your captures and reuse them for future projects. Image Capture mode allows you to capture multiple aspects of your window depending on how you set it. Text Capture mode can capture any text, e.g., Windows Explorer file listing, and convert it automatically to text—handy for preparing lists of files for your printer/service bureau, preparing a list of files for editing, or preparing a file listing for inclusion with your proposal. Web Capture mode allows you to capture quickly all the images from a Website by typing the URL. Video Capture mode can record from a video playing on the Web or record a series of screen shots.

Per Amy McGeady of the APMP International Board of Directors, "My business partner uses [it] to grab and mark up screen shots to help guide teams through using new technology (e.g., we helped a client implement eRoom, and she used this as she developed the guide). Suggested by: Amy McGeady, APMP Regional Director, and by Wendy Frieman, NCA Chapter.

TechSmith
www.techsmith.com/screen-capture.asp

Cost: $49.95/person (30-day free trial version)

Snipping Tool

Use this free utility to capture images from your screen and use them in documents, presentations, user guides, etc. The tool is available on PCs running Vista, Windows 7, or XP Tablet edition (no version for Windows XP computers). It is different from the "CNTL + Prnt Scrn" keyboard shortcut because it allows you to save your snips as .PNG, .JPG, and .GIF formats. I added a copy to my Quick Launch menu for easier access.

Microsoft
(already on your PC), Start Button>All Programs>Accessories>Snipping Tool

Cost: "free" – already on your PC

Mind Mapping

A mind map is a graphical representation of words, ideas, or other items organized around and linked to a central work idea. Sub-topics/ideas "branch off" of the central idea and surrounding first-level ideas. Mindmapping encourages brainstorming and non-linear thinking.

Freemind

For application uses and functionality, see mindmapping description in MindManager. APMP International's Board of Directors also uses it during our meetings to brainstorm and assign next-step actions.

I can export mindmaps as Open Office Writer documents and then open them in MS Word to show the hierarchical output. I can also save mindmaps as HTML and various graphics formats, e.g., .PNG, and then insert into my MS Word documents.

Suggested by: Kirste Webb, APMP CEO

Christian Foltin

http://sourceforge.net/projects/freemind/

Cost: free

Similar Tools:

- iPad Apps: (See iThoughts HD app review.)
- Templates: Found many available on the Web, along with blogs and user groups

Mind Manager

MindManager allows you to organize and manage information visually in a mindmap construct. Of the dozen or so mindmapping programs I have tried over the years, MindManager has the best functionality with a very intuitive user interface.

I frequently use mindmaps with proposal teams to brainstorm features and benefits, win themes, proposal sections, presentations, graphics, tables, literally any kind of writing assignment. I also find it very useful for developing SWOT analysis. I have created proposal "lessons learned" presentations for clients and used MindMapper's presentation mode to present the content in a riveting, non-PowerPoint format.

I use it to review RFPs and to create visual summaries of the subject matter and related requirements. I can usually fit the entire contents of complex SOW onto one page with enough detail to allow me to explain the client requirements and challenges to another team member quickly.

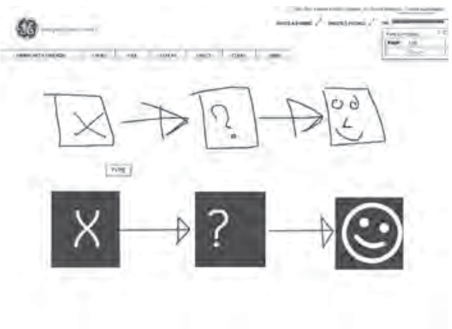
With MindMapper, I can attach hyperlinks, graphics, spreadsheets, notes, and other content to my mindmap. Once I create my mindmap, I can easily export the contents into MS Word, MS PowerPoint, and many other formats and begin finalizing my documents into final products.

MindJet

(415) 229-4200, www.mindjet.com/products/mindmanager-8-win/overview

Cost: $349/person (free 30-day trial)

Online Collaboration



GE Imagination Cubed Online Whiteboard

I found this useful program recently via a mention on Lifehacker.

This interactive, online whiteboard allows you to collaborate using a Web browser. You invite folks to join you via an email link from within the Webpage. You do not have to register or add any software to your computer. Once your team joins, just start drawing using the intuitive tools provided.

The system records all of your drawing movements. When you are finished, you can save or print your drawing. Simply visit ImaginationCubed.com, invite a few friends and start drawing. Invitees will automatically be added to the page and the built-in recorder will track your every movement (for future playback). When you are done, replay your drawing session, send the drawing to your friends or print it. I also grab a copy using Snagit so I can easily copy and paste it into another document.

GE

www.imaginationcubed.com

Cost: free

Goto Meeting

I use GoToMeeting to hold online meetings and demos and to collaborate with teammates on particular documents or presentations. I use it for solutioning, RFP reviews, storyboarding, writing, planning meetings—any time I need to work on a document with someone but cannot be there in person (I used it extensively during our blizzards this winter when I was trapped at home with no snowplows in sight!).

I can schedule meetings ahead of time and send email invitations or send an email invitation for a spontaneous meeting. I can share control of my screen with any or all participants so we can all use the included document highlighting/markup tools or edit the document on my screen. Since I am running the native program on my computer, e.g., Illustrator, MS Word, drawing program, participants can view/make changes to any kind of file that I share with them.

Citrix

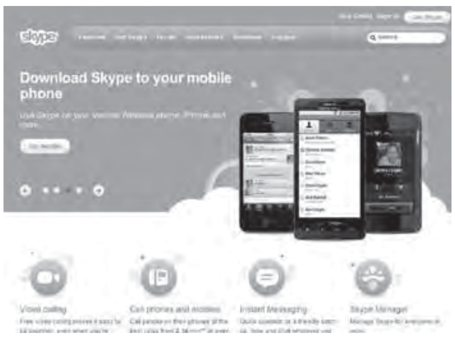
(1-800-263-6317)

www.gotomeeting.com

Cost: unlimited online meetings with up to 15 attendees, $49.00/month or $468.00/year; (free 30-day trial)

Similar Tools:

- iPad Apps: GoToMeeting, free for participant apps, works on iPad as a participant, but currently you cannot initiate a meeting from the iPad. Bobbie O'Brien, APMP Director of Strategic Initiatives, told me that she uses WebEx successfully on her iPad for online meetings.



Skype

I use this free, face-to-face, Internet-based communication versus using a telephone when I do not have access to GoToMeeting. I can show my desktop (resolution is not terrific, but sometimes it is "good enough"). I can also send text messages while talking. Colleen Jolly, APMP-NCA Secretary, suggested the program to me and said it is the "easiest and cheapest way to talk to international folks. Particularly with the video conferencing—it is easy to read people's facial expressions and to literally hold up pieces of paper or whiteboards to say "is this what you mean?" I find it essential when dealing with different cultures to see the people I am talking to. A lot gets lost in translation in email or even in words over a telephone."

I also use Skype when I am traveling for APMP meetings or spending time away from home on a proposal to talk with my daughter "face to face." We both enjoy the more "interactive" format.

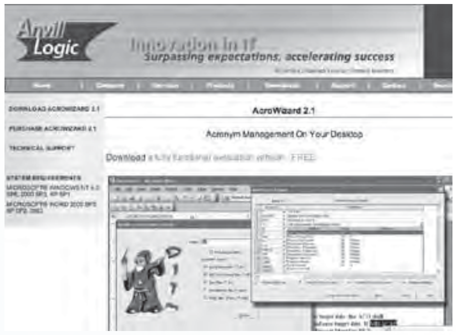
Skype requires a headset or a built-in microphone and speakers on your computer as well as a Web camera to make free video calls.

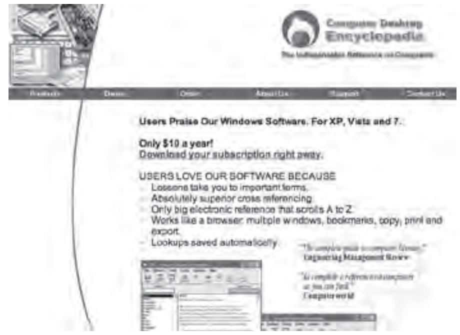
The Apple AppStore has a Skype app available, but will start charging a monthly fee for 3G use at the end of 2010. Presume my "wireless" connection at home will still be free, but the iPad does not come with a camera, making this just a "free phone call."

Skype

www.skype.com

Cost: free





Acronym Finder

Use this Website to find the definition of any acronym or abbreviation (integrates with AcroWizard). It contains more than 4 million acronyms and abbreviations. You can also type in any U.S. or Canadian zip/postal code and see the corresponding city name, area code, time zone, population, housing, land area, water area, map, and surrounding zip/postal codes.

AcronymFinder
www.acronymfinder.com

Cost: free

Similar Tools:

- Multiple acronym-related apps available in the AppStore.

AcroWizard 2.1

AcroWizard proves its worth the first time you use it. It analyzes any MS Word 2003 (Word 2007/newer save down to 2003 first) compatible document (or a group) and builds a table of acronyms that you can insert into a new or existing document. It identifies defined and undefined acronyms. It indicates multiple definitions for an acronym.

With this tool, I can develop an acronym table to insert in my proposal at the last minute versus spending hours pre-production pulling this information together. When developing resumes or past performances for a proposal, I generate a large acronym list from the subject resumes, past performances, RFP documents, and similar-content proposals/previous competition proposals and then index the acronym list in dtSearch. I can then just type the acronym I am looking for into my acronym list(s) dtSearch index and find the definition in milliseconds—extremely useful when I am working on hundreds of resumes or other documents.

You can set up your software so that you can right-click your mouse on an acronym and see its definition from AcroWizard's 35,000-word database—and you can add your own acronyms to the database as you work on documents. AcroWizard also integrates with AcronymFinder.com so you can access 4 million additional acronyms and abbreviations.

Anvil Logic, Inc.
(703) 519-8045,
www.anvillogic.com/products/

Cost: $79.99/person (free fully functional evaluation version)

Computer Desktop Encyclopedia

This is another of my "I never want to be without it" tools—it is been around since 1981. It provides definitions of all major hardware and software technologies using understandable language. The guide contains more than 25,000 definitions and 3,000 illustrations, photos, charts, and diagrams. Content is cross-referenced extensively. (You can also enter terms phonetically if necessary!)

I use it to determine correct placement of technologies, languages, hardware, software, and buzzwords while developing resumes and past performances. I use it when writing/editing proposal sections to be sure I am explaining concepts clearly. I use the graphics as reference materials for my graphic artists and reviewers.

There are no current plans to develop an iPad-specific version, but the developers told me that they will be releasing an app for Android-based smart phones.

Computer Language Company
(215) 297-8082,
www.computerlanguage.com/

Cost: $10/year Web-based product with automatic monthly updates); $4.99 from iTunes Store for iPod Touch/iPhone; free download demo version with 250 terms

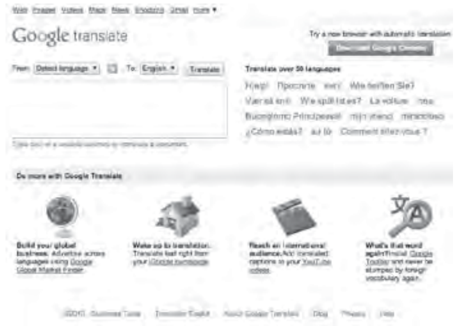
Chicago Manual of Style

Although I have an expensive copy of this style guide sitting on my office bookshelf, it is too big to fit easily into my laptop bag or to carry to meetings. This Web-based subscription works wonderfully wherever I am, whenever I need it. I can quickly find answers to style-related questions or “show a client” why I edited a document the way that I did, e.g., putting the comma (or a period) inside the final quotation mark or outside the final quotation mark. The guide contains the same content as the hardcopy, but unlike the hardcopy, I can quickly copy and paste particular grammar and punctuation “rules” into my own online “mini style sheets” for a particular proposal or client (and then post, print, or email to proposal teams with my writers’ guide).

iPad Apps: Website works well via iPad browser. Maintains bookmarks and views graphics in guide. Also allows access to my saved “style sheets” and proofreading marks.

The University of Chicago Press
www.chicagomanualofstyle.org/contents.html

Cost: $35 for a 1-year individual subscription (free 30-day trial)



Google Translate

This Web-based app provides quick, short translations to many common languages. I can compose quick bits of text for emails to colleagues in other countries who may not speak/write in English easily. For example, if I am trying to get basic details for a meeting with colleagues in Mexico City, but my primary contact (who speaks English) is not available, and I am corresponding via email with the Spanish-speaking proposal coordinator, I can go to the Website, type in questions I want to ask in my email like, “What time will the meeting start? Who will attend the meeting? Which documents will you need for me to email to you?” and paste the translations into my email. When I receive the reply, I can paste it into the app and translate it back to English. It is not perfect, but using this tool, I am able to prepare for the meeting and get my documents ready instead of having to wait to talk with my primary contact. Suggested by: Kirste Webb, APMP CEO

Vendor: Google
http://translate.google.com/#

Cost: free

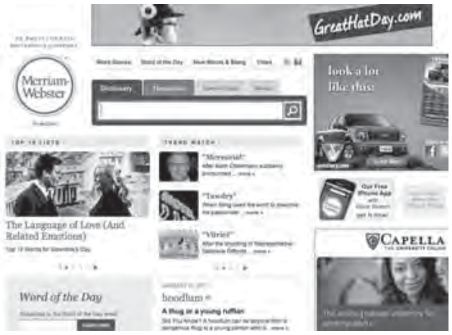
Philips 660 Digital Voice Tracer

I bought this product to take digital audio notes safely during daily standup meetings while I was driving my daughter to school. With the voice activation feature, the tracer recorded my comments and action items. Once I arrived at the client site, I plugged the tracer into my computer, transferred my file, and the system automatically transcribed my verbal notes. I could then email assignments to team members. Although I had to spend about an hour setting the system up and training it to recognize my voice, the time investment was well worth it, and I am impressed with the accuracy of transcriptions.

Phillips/Nuance
www.consumer.philips.com/c/dictaphone/speech-recognition-edition-lfh0660_10/prd/us/

Cost: $140 for recorder with software

Dictionary



DoD Dictionary of Military Terms

From this page, you can browse the DoD Dictionary of Military and Associated Terms. The master database is managed by the Joint Doctrine Division, J-7, Joint Staff. It contains all approved joint definitions as amended through October 2009. I also downloaded the .PDF version from www.dtic.mil/doctrine/new_pubs/jp1_02.pdf) so I can easily search for information when I am not online.

DoD Dictionary of Military Terms
Type/Purpose: Dictionary
www.dtic.mil/doctrine/dod_dictionary/

Cost: free

Similar Tools:

- Website works via iPad browser.
- U.S. Military Acronyms and Abbreviations by Inner Four, Inc., free, very comprehensive listing of DoD acronyms. Also, check out the Military Dictionary by Inner Four, Inc., $1.99.

The Free Dictionary

This Website is very useful because the home screen is set up with tabs containing an English dictionary, medical dictionary, legal dictionary, financial dictionary, acronym listing, idiom listing, encyclopedia, and Wikipedia encyclopedia link. Besides providing the definition in the resource you select, the tool tells you where else it found the word, e.g., legal dictionary, acronyms, and Wikipedia, with a one click link to the other locations. It has an audio pronunciation feature (with choice of U.S. and U.K. accents!) and a translation feature for English to Spanish, French, German, and Italian.

The dictionary is also available in multiple languages, including Spanish, German, French, Italian, and Portuguese, with other languages in the works.

freeDictionary
www.thefreedictionary.com/dictionary.htm

Cost: free

Merriam-Webster Dictionary

I have this program loaded on my computer, and it is much easier than carrying a heavy dictionary around to client sites and meetings! It has better word choice than MS Word's dictionary/thesaurus, and it is also available online, so I can use it from any computer, including my new iPad.

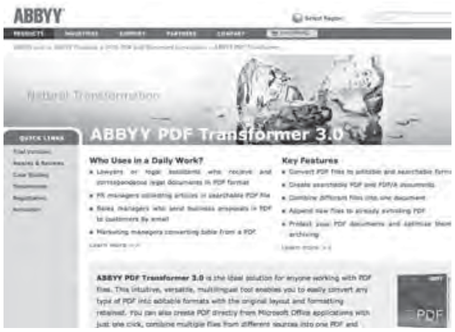
Merriam-Webster
www.merriam-webster.com/dictionary

Cost: (free online dictionary and thesaurus) http://www.merriam-webster.com/dictionary/; annual subscription to unabridged dictionary/thesaurus $29.95; buy $25 hardcopy dictionary with CD copy included to take anywhere on your computer)

Similar Tools:

- Merriam-Webster Dictionary Website works via iPad browser.
- Dictionary.com (based on Random House Unabridged Dictionary), free, basic dictionary app that resides on your iPad for times when you're not hooked to the Internet.
- Advanced English Dictionary and Thesaurus by Mobile Systems, free, "lexical database of English with up to 140,000 entries and 1.4 million words…organized with an innovative and convenient approach…grouped into sets of cognitive synonyms, interlinked by means of conceptual-semantic and lexical relations."

PDF Conversion



ABBYY PDF Transformer 3.0

ABBYY PDF Transformer is another of my "life saver" programs that I have used for years through multiple versions. It converts any type of PDF into editable formats and retains the original layout and formatting—even tables and multi-column formats with graphics. From within MS Office apps, I can create PDFs with one click. ABBYY also combines multiple docs into one PDF. It allows supports document redaction and a number of other functions.

Vendor: ABBYY
(408) 457 9777,
http://pdftransformer.abbyy.com/

Cost: $79.99/person (15-day/50-page free trial)

Primo PDF

This free utility creates PDFs from more than 300 file types, and the PDFs open in any PDF viewer. You can specify varying levels of PDF quality, e.g., screen, print, eBook, and pre-press so you can create a file that is optimized for your needs, e.g., to be read on an eReader device like my Sony eReader. You can use the program online to convert files to PDFs (up to 10MB in size) and email them to yourself! PrimoPDF is the #1 "PDF Software" utility on CNET® Download.com.

Nitro PDF, Inc.
http://www.primopdf.com/index.aspx

Cost: free

Similar Tools:

- Pages, $9.99, the app that basically stands in for MS Word on the iPad can save docs as PDFs so you can upload them to your PC or email them. Other selected applications can export PDFs as well.
- iAnnotate PDF by Aji, LLC, $9.99, is a PDF reader and an annotation tool for your PDFs that allows you to open docs from email, highlight text, underline text, add notes, copy text, create new toolbars for the app, and review multiple PDFs in a "tabbed" format.

Additional Resources

dogpile

With a metasearch tool such as Dogpile, you can do Web searches across multiple search engines at the same time, and you will end up with a better cross-section of results than by searching one search engine at a time. You can search for documents, images, and videos. Dogpile searches across Google, Yahoo, Bing, and Ask at the same time.

Dogpile
www.dogpile.com

Cost: free

dtSearch

dtSearch has an extensive product line for searching terabytes of text across a desktop, network, Internet, or intranet. Basically, you can create and automatically update indices of every word in every file in locations you specify. Indicies can be set to update automatically and searched for particular words/phrases/text across one or multiple indices using Boolean or Google-like searches. "Hits" appear in a two-part window with the file names/paths/other info in the top window, and the hits highlighted in yellow shown in their original document format in the bottom window.

Any of the "hit" documents can be opened or emailed from dtSearch. Search reports can open automatically in MS Word and show the term(s) you searched for along with the resulting hit file names and document info and surrounding text (if desired). Unindexed searches can also be performed.

I used dtSearch at MSD/Lockheed Martin to search for resumes, past performances, proposal boilerplate, and graphics. I also use the program to index and search RFPs (single or multi-part RFPs) for content and quickly see them in context (and print a report of my hits). Doing this, I can search hundreds of pages of text and/or Q&As for specific references.

dtSearch
1-800-IT-FINDS,
www.dtsearch.com

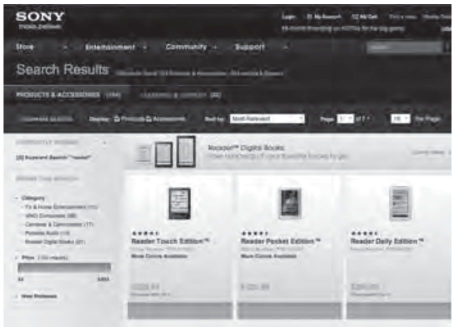
Cost: $199/single seat (free 30-day trial); Network version $160/seat for 5 seats

Life Hacker

Interesting eclectic Website that has useful/interesting software suggestions, tips, tricks, social networking info—worth a bit of surfing around (that is how I found the new GE online whiteboard product).

Gawker Media
www.lifehacker.com

Cost: free



Reader Digital Book

If I could only grab three possessions out of a burning building, my Sony eReader would definitely make the cut! I use my eReader to store/read RFPs and then search for content during meetings. I borrow books from the library (Overdrive Software) and carry my favorite reference books with me. I read the APMP *Journal*, *Perspective*, chapter newsletters, and body of knowledge papers on it.

The pocket edition holds up to 1,200 books. I can buy the latest novel and read it wherever I am in the world. I also download travel guides from Trip Advisor and other sites for use on business trips and vacations.

The Sony Reader Library contains thousands of free and payfor books and newspapers. The Library of Congress now offers free ebooks for download!

Sony

- Reader Library: ebookstore. sony.com/download
- Overdrive Media Console: www. overdrive.com/software/omc/, free

Cost: Sony eReader: $169-$349

What Time is It

This handy Web-based tool helps to determine time in another city/continent. It is great for planning meetings with folks in other time zones, e.g., setting up a virtual proposal kickoff meeting for folks around the world and trying to figure out the best time of day to hold the meeting so that everyone can attend. Suggested by: Kirste Webb, APMP CEO

WHAT TIME IS IT

http://whattimeisit.com/
Cost: free

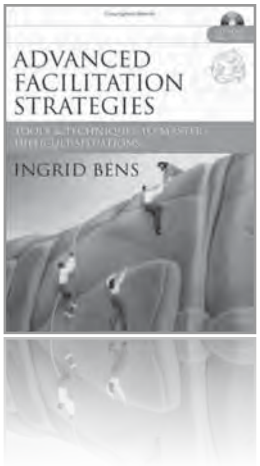
Similar Tools:

- Website works well via iPad browser. Various apps available from AppStore.
- Similar PC Tools:
- Time Zone Converter, free, (www. timezoneconverter.com/cgi-bin/tzc.tzc)
- The World Clock, free, (www. timeanddate.com/worldclock/)

If I could only grab three possessions out of a burning building, my Sony eReader would definitely make the cut!

Author Bio

Beth Wingate, AF.APMP, is the 2010–2011 APMP Director of Education and a member of the 2010 Class of APMP Fellows. She served as 2008–2009 APMP National Capital Area (NCA) President and was awarded APMP's 2008 Chapter Chair of the Year. She is a Managing Director at Lohfeld Consulting Group and has 23 years' experience managing, writing, illustrating, and producing winning proposals. She managed a Proposal Center and trained and mentored proposal/BD staff in industry best practices. She presented at APMP's 2008, 2009, and 2010 Conferences, APMP-NCA's 2008 Proposal Basics Boot Camp, APMP-NCA's 2010 Mid-Atlantic Proposal Conference and Expo, APMP Northwest's 2010 Conference, APMP Nor'easters 2010 Conference, APMP Georgia Chattahoochee, Carolina, and Florida Sunshine Southern Proposal Accents Conference. Beth wrote and teaches proposal development classes for Lohfeld Consulting Group and FedSources. You can reach her at Beth.Wingate@APMP.org, www.LinkedIn.com/in/BethWingate, Twitter @Beth_Wingate, and www.facebook.com/LohfeldConsulting.



Advanced Facilitation Strategies: Tools and Techniques to Master Difficult Situations

Ingrid Bens

Jossey-Bass, 2005

$37.79

by: **Jim Hiles**

Ingrid Bens, the author of *Advanced Facilitation Strategies: Tools & Techniques to Master Difficult Situations,* is a Certified Professional Facilitator by the International Association of Facilitators. She has authored a number of books about facilitation and has accumulated close to 30 years of experience as an organizational development consultant and workshop leader. Her companion book, *Facilitating with Ease!,* is intended to put forth core skills for facilitation. In *Advanced Facilitation Strategies,* Ingrid shares strategies to deal with complex facilitation dilemmas and provides insights into how to increase your competency as a facilitator.

A common thread in the proposal management profession is the need to get ad hoc groups to come together quickly; explore options; make critical decisions; and advance a proposal from an idea to a complete, compliant, and compelling submission. It has been my observation that successful proposal management professionals meet many or all of the assumptions that the author makes regarding the readers of this book, including: that you have had first-hand experience designing and leading meetings, that you want to improve your ability to diagnose facilitation assignments, and that you want to become more resilient and confident when dealing with difficult situations and dysfunctional people.

Many specific behaviors and strategies are presented in *Advanced Facilitation Strategies*. Immediately recognizable to proposal management professionals are the challenges of members giving assignments to individuals who are not at the meeting or of witnessing reliable workhorses volunteering while others evade responsibility.

Advanced Facilitation Strategies is presented in five well-organized chapters. While there is no index provided, the table of contents is very thorough, making it easy to find a particular topical area, to go straight to a specific issue or challenge you are facing, and to find suggested strategies and tools to overcome that challenge. A welcome item is a bibliography of references, something not often provided in a professional how-to book. There is also a CD included that contains all of the book's tools and surveys. Many of these tools and surveys are provided as Word documents, and all are provided as PDFs. For the price, the inclusion of the CD with all of the tools and surveys is a bargain.

The opening segment of the book walks the reader through the competencies of facilitation and a self-assessment to gauge

"Throughout the book, ideas are presented crisply, in a format that enables ready conversation to action in practice."

> *“Immediately recognizable to proposal management professionals are the challenges of members giving assignments to individuals who are not at the meeting or of witnessing reliable work-horses volunteering while others evade responsbility.”*

your own level of competency as a facilitator. This opening or overview chapter then goes through types of consultants (expert and process) and types of interventions (content and process). Other overview or foundational items are also covered, such as managing the roles of leaders in your group and advanced skills observation. This chapter closes with the five rules of facilitation that nicely dovetail with the levels of competency, and with the opening discussion that includes an important segment on developing your personal philosophy of facilitation.

The second chapter focuses on decision making, the third on conflict management, and the fourth on consulting strategies. Chapters two and three hone in on two categories of common issues encountered during facilitation, and chapter four is process oriented.

Throughout the book, ideas are presented crisply, in a format that enables ready conversion to action in practice. For example, the author defines an intervention, speaks to the importance of making an intervention, and then provides sound tactical advice on knowing when to intervene. The groundwork is laid; important considerations are covered; and specific strategies, tools, and methods are provided, including questions to ask yourself when considering an intervention and suggested wording to use to check the pace, progress and pulse of a meeting. In the course of the book, 30 common facilitation dilemmas are covered. In chapter 3 on conflict management, nine intervention strategies are provided to directly address various dilemmas.

In the fifth and final chapter, the author starts with the observation that advanced facilitators “know the steps of the most pervasive processes and are aware of how they unfold.” Sections of this chapter are devoted to 14 process maps that are in one of three categories—planning processes, problem-solving processes, and relationship-building processes. In addition to her advanced facilitation skills, the author’s advanced organizational skills are also evident in this chapter, which adeptly uses this classification scheme to succinctly present and make sense of the three pervasive processes. One pervasive process that proposal management professionals will immediately recognize is that of Team Launch. The author’s insights into setting a clear framework for the team, building buy-in, and fostering strong working relationships at the Team Launch will be valuable to anyone chartered with ensuring proposal success.

Ingrid Bens speaks to the reader in a conversational voice that is not in any way condescending or overbearing. *Advanced Facilitation Strategies* is a comfortable read, akin to having a long thoughtful conversation with an expert facilitator who has paid attention throughout a comprehensive career and a large number of successful facilitations.

Illustrations depicting conversations during facilitation and numerous process flows, bullet lists, and tools are also provided. Some books are criticized for over-reliance on bullet lists and graphics. This is not one of them. The book offers a conversation that you will enjoy having.

Jim Hiles is an avid consumer of business development-related books and materials. He is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the Federal Government. Jim manages Public Sector Business Development for the MorganFranklin Corporation and is The APMP *Journal* Book Review Editor.

Optimisez vos Propositions commerciales:
Méthodes et outils du Proposal Management

Giandra de Castro and Frédéric Vendeuvre

Paris: Dunod, 2009.

by: **Jayme A. Sokolow**

France would seem to be a wonderful country in which to write commercial proposals. It is one of the G8 and its economy is sixth worldwide. It ranks fourth in the world in imports and fifth in exports. In terms of per capita Gross Domestic Product, France leads all other G8 countries and has a higher standard of living than the United Kingdom. France also has a high life expectancy, the best healthcare system in the world according to the World Health Organization, and a rather remarkable equality of personal incomes in comparison to most other countries.

However, according to Giandra de Castro this is the first book-length systematic analysis of commercial proposal development to be published in France. The previous 10 books on the subject were designed to help beginners or small businesses get started.

De Castro and Vendeuvre are well-qualified to write a sophisticated book on developing winning commercial proposals. Castro is the co-founder of Jack in the Box (http://www.jitb. typepad.com), a French proposal management company. Readers of *Proposal Management* may remember her lively 2008 article on "Proposal Management in France." Vendeuvre is the co-founder of Halifax Consulting and has published three previous books on selling and negotiating.

Optimisez vos Propositions commerciales: Méthodes et outils du Proposal Management [*Optimize your Commercial Proposals: Methods and Tools of Proposal Management*] has two major goals: (1) to provide the best information about how to improve commercial proposals; and (2) to increase the reader's skills and motivation to sell more effectively. De Castro and Vendeuvre succeed admirably in their goals in a compact and well-organized book that sparkles with Gallic wit and charm. This is probably the first book on proposals to quote Victor Hugo and to have deliberately humorous and off-beat bulleted lists about organizing and writing proposals.

Optimize your Commercial Proposals is divided into nine chapters. The first chapter discusses the importance of proposal management in the commercial sector. Here De Castro and Vendeuvre explain the basic themes of their book. Chapter two examines the importance of cultivating commercial clients before submitting proposals. While this may seem obvious to Americans in business development, de Castro and Vendeuvre believe that French management is surprisingly handicapped: "most French employees, particularly in large companies (with rare exceptions), have no practice selling in their profession."

Chapter three is designed to help proposal professionals develop a vision and a strategy before responding with a written proposal. It contains such practical advice as how to differentiate yourself from your competitors and how to prepare the groundwork for a competitive bid.

A lengthy chapter four discusses the "ingredients" of a good proposal. These subsections—which cover topics like the letter of inquiry, the cover page, the table of contents, executive summary, and budget with a focus on developing an integrated and compelling document—will

> *"This is a clear, thoughtful, and informative study that will help French companies become more skilled in managing and developing proposals in the private sector."*

be very familiar to American proposal professionals.

Chapter five emphasizes writing style and visual design. Missing in chapters four and five is a thorough discussion of how pictures, diagrams, charts, tables, and action captions promote understanding and foster persuasion. In addition, the black-and-white visuals are bland and difficult to read. Because the authors are well-informed about American proposal practices, they might have helped their readers by discussing the work of Edward Tufte on visual intelligence.

In chapter six, the authors provide a framework for business professionals to understand the commercial context of their proposals. Chapter seven continues this theme with a description of proposal management from different perspectives. The authors recognize that companies, managers, and marketers may see proposal management very differently and may have conflicting goals.

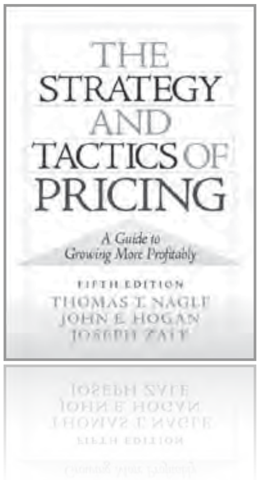
The last two chapters look at the bid/no bid decision, organizing to win, and using a proposal center to increase a company's competitiveness. Throughout these chapters, the authors urge their readers to consider the return on investment as they bid on commercial proposals.

De Castro and Vendeuvre end their book with a series of helpful questions that companies need to ask themselves about their capacity to develop competitive proposals. In good French fashion, they advise their readers to become more "introspective" about developing commercial bids.

Evidently their colleagues are taking heed. At the launch of their book, 50 sales directors met and decided to form the French equivalent of APMP: La Association Française du Proposal Management. De Castro and Vendeuvre hope that AFPM will establish a partnership with APMP.

This is a clear, thoughtful, and informative study that will help French companies become more skilled in managing and developing proposals in the private sector. *Optimize your Commercial Proposals* may become very influential in the Francophone business world.

Jayme A. Sokolow is the founder and president of The Development Source, Inc. a proposal services company in the Washington, DC metropolitan area. He can be reached at JSoko12481@aol.com.



The Strategy and Tactics of Pricing:
A Guide to Growing More Profitably 5th Edition

Thomas T. Nagle, John E. Hogan, and Thomas Zale

Pearson Prentice Hall, 2010

$57.95

by: **Jim Hiles**

What is the one thing that every buyer considers when making a purchase decision? Price. Government clients are required to consider price, and in most cases require a separate cost or price volume in addition to technical or business proposals.

In their book *The Strategy and Tactics of Pricing: A Guide to Growing More Profitably 5th Edition* authors Nagle, Hogan, and Zale provide a succinct yet comprehensive guidebook to "developing more systemic processes for creating, communicating, and capturing value." This is the primary message of *The Strategy and Tactics of Pricing.* The message is not delivered by exhortation alone. Instead, 15 chapters provide depth and detail on the whys and hows of pricing, and include numerous examples, formulas, and workouts of presented formulas based on case studies presented.

The Strategy and Tactics of Pricing starts with the strategic pricing pyramid, and explains in detail the foundational elements of a pricing strategy. This is not a pricing strategy for a specific proposal or bid, but rather a pricing strategy for a firm or profit center. Longtime consumers of proposal-related books and training courses have likely been exposed to a variety of expositions on price volume presentation and differentiating offers on value versus lowest price strategies. Readers crossing over into the more comprehensive treatise on the subject contained in *The Strategy and Tactics of Pricing* will find these tactics covered in much greater detail, and will follow a roadmap to transform an enterprise from tactical to strategic pricing.

The authors' foundational elements of the strategic pricing pyramid start from a base of value creation and price structure, move up through price and value communication and pricing policy, and reach the pyramid's peak of price level or price setting. An entire chapter is devoted to each of the five levels in the pyramid. These chapters are well organized, as each starts with an introduction to the pyramid level and key concepts; includes case studies, illustrations, and examples; and closes with an executive level summary that captures the essence of the chapter and provides a logical linking segue to the next chapter.

While *The Strategy and Tactics of Pricing* appears upon initial cursory inspection to be geared toward the C-suite level, bigger picture thinkers, or expert/academic pricing specialists, there are many concepts, ideas, and illustrations of tremendous value to pricing tacticians, capture leads, proposal managers, and pricing professionals. One example from the book starts with an easily followed discussion of the differences between cost-based and value-based pricing. This concept is developed using an illustrated step-through of formulas provided with data from a case study for estimating the economic value of the benefit that a product or service can offer, "Economic Value Estimation®" in the authors' parlance.

The authors note that "in many industries, the current profit leader is a company with a very explicit pricing strategy supported by its product and promotional strategies." The sequence of chapters immediately following the pyramid buildout are devoted to a profit leader's strategic pricing ideas and activities, as opposed to a volume leader's metric of success. Remaining chapters are primarily devoted to implementing the presented ideas.

Current business and economic conditions and customer perspectives are addressed throughout the book. Unlike other "subsequent editions" *The Strategy and Tactics of Pricing* authors succeed in incorporating current themes and conditions (such as customers influenced by environmental or green considerations or shifting global demand) throughout the book, as opposed to revised editions that present the same earlier edition content and add a disjointed appendix or chapter as an update.

This reader is fully immersed in the world of pricing in a business-to-government arena, where the spotlight on companies is generally held firmly on market share, volume, and growth. Commentators speak to who is the biggest, top 100 lists are generated based on sales revenue (volume), and high-growth firms are exalted. *The Strategy and Tactics of Pricing* takes readers like me outside of this industry myopia to a higher plane of pricing consciousness.

continued on page 66

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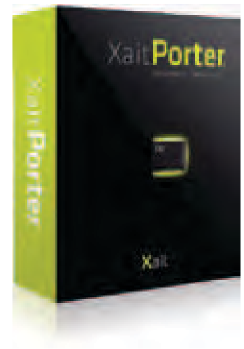

Customer statements:

"XaitPorter ensures that the entire tender, and all tenders, have consistent corporate branding–font, style and colors. And, more importantly, it has helped us reduce the time it takes to produce the tenders by as much as 50%."

– Director of International Sales, global oil services company

"We are producing 30% more complex proposals (500+ pages) than we did 3 years ago, with the same sized proposal team. And we have increased our win rate."

– Tender Co-Ordinator, global engineering company

"In our global XaitPorter survey, more than 90% of the management from our global geomarkets have been very satisfied with the results achieved using XaitPorter."

– VP Sales & Marketing, global oil service company

"We have reduced our average write-up for our proposals from 5 to 2 days using XaitPorter."

– Global VP, services company

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> *"Some readers will undoubtedly be put off by a volume that contains many examples that are not obviously applicable to their daily activities... however, taking the time to pay attention to such examples and ideas will expand the reader's repertoire and increase understanding of profitable business growth."*

Some readers will undoubtedly be put off by a volume that contains many examples that are not obviously applicable to their daily activities, such as evoked anchoring, a business-to-business interview technique to help determine the financial benefits to a customer that a product or service could influence. However, taking the time to pay attention to such examples and ideas will expand the reader's repertoire and increase understanding of profitable business growth.

The authors are well qualified. Tom Nagle holds a PhD from UCLA and has worked as a professor of marketing and strategy at the University of Chicago and at Boston University. He is a sought after commentator and expert on pricing. John Hogan is a partner at Monitor Group and leader in their strategic pricing practice, where he focuses on developing more effective pricing strategies in technology, software, distribution, manufacturing, financial and professional services, and pharmaceutical sectors. Joseph Zale is a Partner and Global Account Manager at Monitor Group, where he leads the pricing strategy practice. Tom Nagle founded the Strategic Pricing Group and published the first edition of *The Strategy and Tactics of Pricing* in 1987. John Hogan co-authored the 3rd and subsequent editions, and Joe Zale joined in on the 5th edition.

Together, these experts have provided a thought-provoking and comprehensive guide to profitable growth that has remained in step (or even ahead of) our evolving business climate. The book would be a welcome addition to any business developer's bookshelf.

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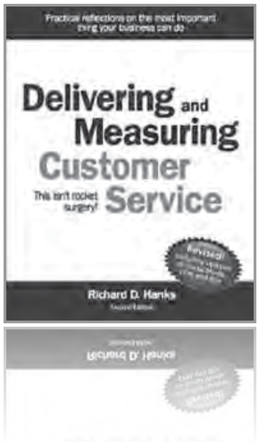

Delivering and Measuring Customer Service:
This Isn't Rocket Surgery! 2nd Edition

Richard D. Hanks

Duff Road Endeavors, 2010

$21.95

by: **Purvi Shah, APM.APMP**

Richard Hanks summarizes his experience in *Delivering and Measuring Customer Service* using two main principles:

- The first principle states that the major drivers of financial success can be traced back to loyal customers who recommend your business over and over, and loyal employees who become increasingly more productive, providing better service and contributing more to the company's bottom line over time.
- The second principle states that a company that continuously measures their customers' experience will improve exponentially. He also highlights that your customers' needs and wants change continually—you must measure their experiences in real time, be flexible, and try to anticipate their needs.

Richard Hanks recommends that we measure customer perceptions of service quality on the five dimensions of reliability, responsiveness, assurance, empathy, and tangibles like atmosphere and appearance.

In Part II - Cultural Catalysts of Service, the author echoes a platinum rule of customer service: 'We do for our customers as they would have done for them.' I agree strongly with this rule as it pertains to proposal development. I believe that a responsive, compliant proposal will resonate how our capabilities and technical solution meet a customer's needs and challenges.

He states in Part III – Gathering Customer Feedback that you can engage the customer in providing feedback in all five dimensions through various kinds of surveys (automated phone, Web, and mobile-device surveys). These surveys will make customer feedback convenient, anonymous, unbiased, immediate, and actionable and give you a complete picture of your performance.

I did not find the detailed information on survey incentives, methodology, and design to be useful for my current role as Sr. Engineering Project Manager in Global Services Sales. Typically at my company, the marketing department designs and conducts surveys and marketing events to gather customer feedback. I was also uninspired by Part IV – Analyzing the Results of customer feedback. The information in this section might be useful to people in marketing or business operations that are usually tasked with analyzing such results.

One of the most important keys to continuous improvement in customer service is to institutionalize customer feedback and measurement and make it a "Brand Standard" of your company. In Part V – Using Customer Feedback to Improve, he says that the best results come from employee involvement in developing and executing against customer service improvement action plans after we get feedback from our customers. A company must use customer feedback to reduce internal variation between locations. It is not enough for a company to be better than the competition, it needs to be better than itself, by making customer satisfaction measurement a required part of doing business.

I agree with Richard Hanks that employees should be recognized and

continued on page 70

"the author echoes a platinum rule of customer service: 'We do for our customers as they would have done for them.'"

"it is much more expensive to acquire a new customer than to keep an existing one across multiple industries."

rewarded for delivering exceptional customer service. The company I work for rewards the top performing sales people with a five-day vacation each year. Such rewards create healthy competition among the sales people to belong to the exclusive 'President's Club' and help my employer increase sales and meet annual revenue targets.

The main thrust of Part VI – Customer Recovery and Follow-up is that it is much more expensive to acquire a new customer than to keep an existing one across multiple industries. A company must treat every customer as someone who brings long-term value. If there is a lapse in service, the best time for the company to recover a customer is immediately after the mistake is made and before they lose them forever. It is important for a company to empower employees with the authority to fix customer issues where and when they happen. The author provides a detailed list of recovery steps that a company can take when a mistake is made with a customer, including taking responsibility for the error or the inconvenience, explaining why it happened, and telling the customer what was "fixed" (transparency).

I agree wholeheartedly that it is important to retain existing customers even while we stake out new markets to find new customers.

A striking point that resonated with me in Part VII – Tips and Tricks is that achieving high quality is not enough; actual quality must be translated into perceived quality. The perception of a product is shaped to a large extent by the things a consumer can comprehend with his five senses.

I think it is funny how simple customer service is, yet how even the most simple of principles can go unlearned or just unpracticed for so long. Richard Hanks does a great job reminding us how important, and how simple, it is to treat your customers right and measure the results.

I found his book to be a refreshing primer on delivering customer service with additional sections on measuring customer service. I would recommend this book to anyone who interacts with people in their business on a daily basis. The comics in each chapter were also painfully funny.

"A striking point that resonated with me in Part VII – Tips and Tricks is that achieving high quality is not enough; actual quality must be translated into perceived quality."

Purvi Shah, APM.APMP is a Sr. Engineering Project Manager in Global Services Sales at Verizon Business. She has been in a hybrid role of Proposal Manager and Information Security SME for the last five years. She is a member of APMP and achieved APMP Practitioner-Level Certification in November 2010. You can reach her at purvi.shah@verizonbusiness.com.


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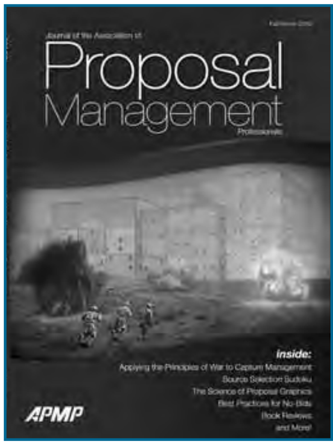

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Article	Parkinson, Mike	The Science of Proposal Graphics
Article	Rudy, Todd B.	Know Thyself, Know Thy Enemy: *Applying the Principles of War to Capture Management*
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Review-Book	Read, Catherine	Stein on Writing
Review-Book	Taylot, Johnnie	The One Page Proposal
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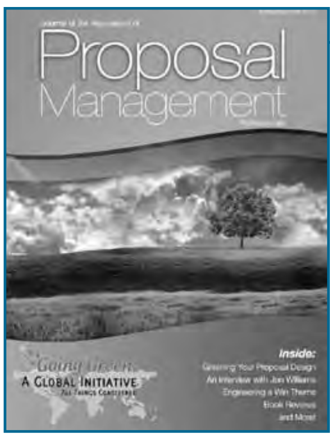

Spring/Summer 2010

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Article	Green, Dennis R.	Talk Time with Jon Williams
Article	Rochon, Michele	Engineering a Win Theme: A Scalabale Prooposal Method for Technical Sales Environments
Article	Sokolow, Jayme	So You Want to Write an Article? A Brief and Encouraging Guide to Writing Articles for Proposal Management
Award	APMP	The APMP Fellows Award
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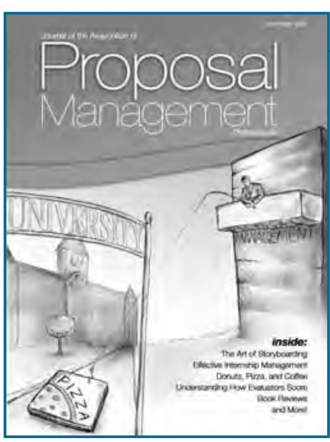

Fall/Winter 2009

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Review-Book	Blakney, Betsy	Contracting with Uncle Sam: The Essential Guide for Federal Buyers and Sellers
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Article	Divine, Charlie	Highlights of Benchmarks in World-Class Proposal Writing Capability Research Study
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Review-Book	Paskun, Ali	Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (5th Edition)
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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
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Review-Book	Vogel, Kerriann	Managing Externally–Funded Projects
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