Welcome

Ali Paskun, AF.APMP

Howdy, Pardners!

Are you ready to saddle up your horses and head West to the Bid & Proposal Con 2012 in Dallas, TX? APMP's 23rd Annual International Conference and Expo is scheduled for May 22-25, 2012 at the Sheraton Dallas Hotel. They say everything is bigger in Texas. With more than 50 sessions to choose from and many changes such as an awards banquet and more networking time between presentations, this year's conference promises to be Texas-sized. If you have not registered yet, there is still time. Visit the Website at www.apmp.org, call 202-450-2549, or email lauren.williams@apmp.org. In the meantime, mosey through this issue of the *Journal* where you will find articles with ideas you can apply to your processes.

Mitch Boretz, F.APMP and Siva Prasad Malkapuram, AM.APMP state that "With easily-accessible and affordable technology, our proposals can be full-scale presentations – and, if we manage transition well, we can even lower the cost of proposing and the time it takes for source selection." In "Toward the Electronic Proposal," they provide an update on the latest efforts of the APMP Electronic Proposal Task Force to partner with customers to increase the use of electronic proposal submissions.

The article "Establishing and Maintaining Bid Team Functionality" is especially meaningful and not only because the topic of identifing and responding to dysfunctions early in the life of a team can increase the team's potential to succeed. Co-author Paul Gardner devoted 37 years to the proposal profession at Sanders Associates, now part of BAE Systems. When he died in 2010 while writing the article, two of his friends and colleagues, Jay Herther and Joe O'Neill, both PPF.APMP, completed it for submission to the *Journal*.

Rick Harris, AM.APMP has completed his first year leading APMP as Executive Director. In a candid interview that includes questions submitted by members on APMP's LinkedIn discussion site, Harris describes for Chris Simmons what has been accomplished during the year to promote and advance our organization, as well as his vision for APMP's future.

Why not be a part of that future vision? Volunteers are always needed at the chapter and International levels. Organize, or even present at, an event for your local chapter, peer review or write an article for this publication, run for a spot on the Board of Directors. You will find it rewarding, and APMP will benefit from your expertise.

Remember to stop by and say "howdy" in Dallas!

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Bid & Proposal Con 2012 in Dallas, TX

APMP's® 23rd Annual International Conference and Expo

May 22-25, 2012

Sheraton Dallas Hotel, Dallas, TX

"Whether you've been to APMP's Annual Conference in the past or this is your first Bid & Proposal Con, we have something new for you."

It's All About You

For the 23rd time in its history, the Association of Proposal Management Professionals® (APMP®) will stage the world's largest educational event of the year for proposal, bid, business development, and capture professionals. This year it is Bid & Proposal Con 2012 on May 22 – 25, 2012 at the Sheraton Dallas Hotel in Dallas, TX – home base for you to learn, reconnect, recharge, and reinforce best practices that lead to winning proposals and bids.

Whether your company is pursuing $100 million dollar federal contracts, $100,000 commercial service agreements, or anything in between, APMP's Bid & Proposal Con 2012 is for you. It's designed by people who do what you do every day.

Simply put, APMP's Bid & Proposal Con 2012 is your industry's leading event and gives you and your colleagues expert education and help in using every tool available to increase your chances for winning. Bid & Proposal Con 20012 is an education and professional development conference and more than anything else, it is all about you.

What's New At Bid & Proposal Con 2012

Whether you've been to APMP's Annual Conference in the past or this is your first Bid & Proposal Con, we have something new for you. Here's a short list of some of the exciting and new features at this year's conference:

New Speakers – Over 30 percent of our speakers are brand new to Bid & Proposal Con. New speakers equal new ideas, fresh content, and more opportunities for you to learn.

Education For Everyone – We have more than 50 educational sessions and something that appeals to everyone. Fourteen are specifically for federal proposal professionals and 12 for commercial professionals. In addition, we have 24 educational programs that are equally beneficial to federal and commercial proposal, bid, business development and capture professionals.

Attendees at the 2012 conference in Denver, Colorado listen intently at the keynote address.

Inset: Past APMP CEO Betsy Blakney gets into the spirit

More Accreditation Opportunities – APMP Accreditation is such an important part of Bid & Proposal Con. On Tuesday May 22 you'll have four opportunities to achieve a level of accreditation that is best suited for you. We're providing a **Foundation-Level Prep Course and Exam** for those trying to achieve their first level of APMP certification; the **Quick Start Practitioner Workshop**, a half-day tutorial for members who would like to understand how to complete the Proposal Practitioner Assessment Questionnaire (PPAQ); The **Practitioner Completion Workshop**, an intense full-day session for members who will complete the Proposal Practitioner Assessment Questionnaire (PPAQ) and earn Practitioner Accreditation status at the Dallas Conference and, finally, APMP's **Professional Interviews** to achieve the highest level of accreditation.

A Printed Program and A Mobile App – We have you covered with a double dose of Conference information. We'll have a printed program for the traditionalists and a smartphone app for the electronically inclined. Both will detail every nuance of the conference.

An Awards Celebration – Join us for a new event to honor your industry peers and chapters who have excelled at fulfilling APMP's mission. This is your awards night. Reserve your seat to recognize all of our nominees and congratulate the winners.

More Time in Between Our Educational Sessions – You wanted more time to network together, and we heard you. That's why we've built in 30 MINUTES of networking time between some sessions.

Networking Lunches – To further encourage collaboration and idea generation, we've made our lunches light on speeches and heavy on networking.

Continuing Education Units

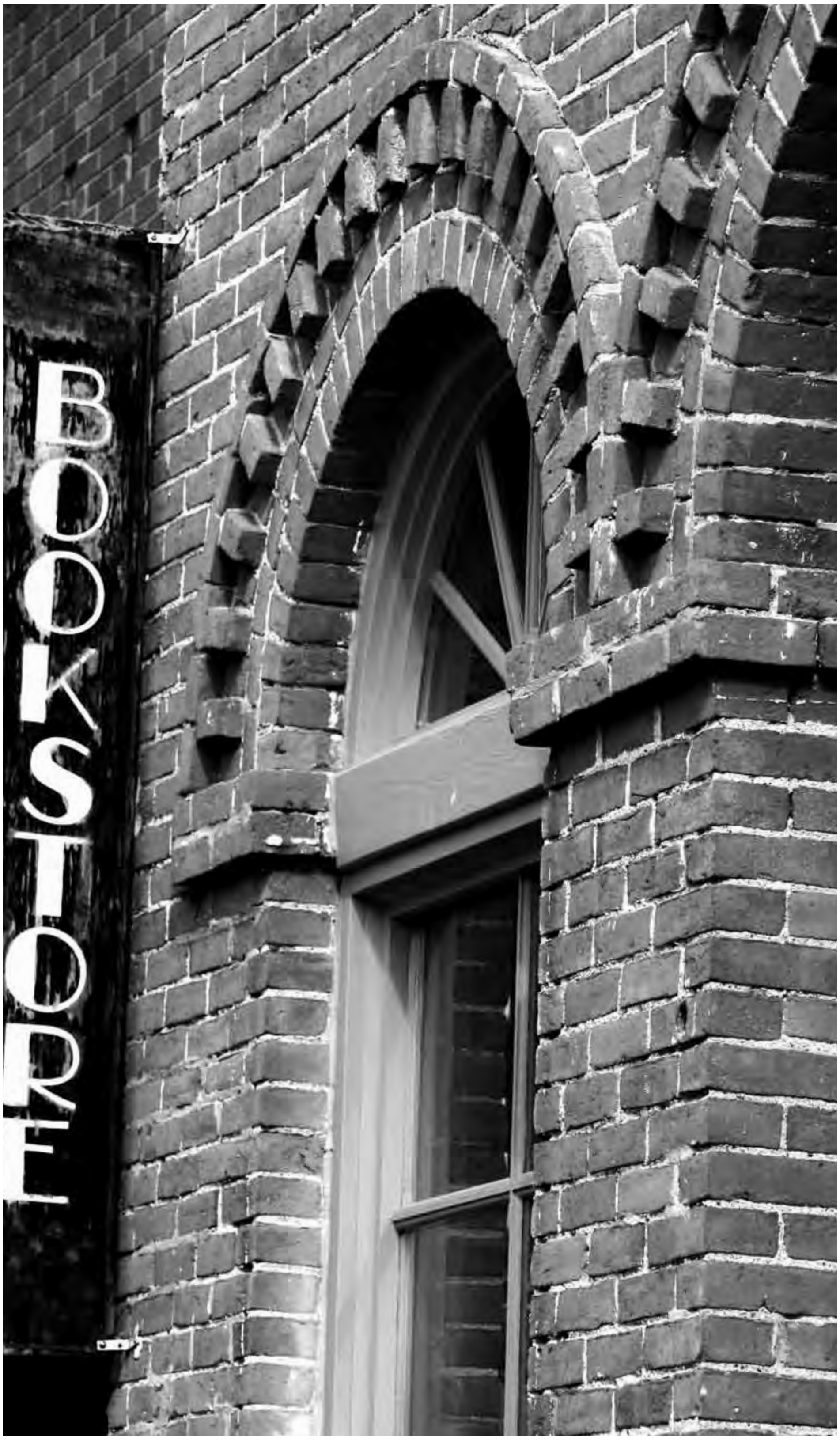
When you attend Bid & Proposal Con, you also earn Continuing Education Units (CEUs) to maintain your professional APMP Accreditation. Here's a list of the CEUs available by attending various APMP events:

- 10 CEUs – for attending Bid & Proposal Con 2012
- 10 additional CEUs – if you are a speaker at Bid & Proposal Con 2012
- 5 CEUs – for partially attending Bid & Proposal Con 2012
- 5 CEUs – for attending any live or virtual chapter educational event such as a meeting, Webinar, symposia, or professional development meeting.

Help is Here For You

Whether you need help registering, locating hotel information or planning your Bid & Proposal Con 2012 trip, your APMP staff is ready to help you. Please call us at 202-450-2549 or email us at lauren.williams@apmp.org, and we will help make your Bid & Proposal Con experience the best it has ever been. See you in Dallas.

Searching for a book?



We got it.

Book Store

May 22–May 25, 2012 at the Bid & Proposal Con Dallas, TX

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

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APMP Mission and Code of Ethics

Mission

- Our mission is: APMP is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations.
- 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.

APMP Board of Directors

APMP®

APMP is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations.

APMP's mission is: APMP is the worldwide authority for professionals dedicated to the process of winning business through proposals, bids, tenders, and presentations. 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.

Change of Address and Correspondence

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:

Lauren Williams
PO Box 77272
Washington, DC 20013-7272
email: lauren.williams@apmp.org

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 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*

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- Half Page: $1,500.00 (B&W)

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

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,
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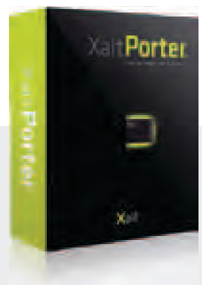

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Guidelines for Authors

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

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

	Spring/ Summer	Fall/ Winter
Concept approval	August	February
Summary and outline due	October	April
Article first draft 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 books
- 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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Toward the Electronic Proposal

New trends in computing and media continue to change the way we do business. It is time for us to work with our customers and others to shape these changes to create a new generation of tools for communicating effectively.

by: Mitch Boretz, F.APMP and
Siva Prasad Malkapuram, AM.APMP

The electronic proposal is here, and it is far more than submission of our work online or on a disk. For decades, even centuries, printed words and static images on paper were the primary tools for formal buying and selling. But today we have the ability to embed links into our documents so reviewers can find key sections readily. We can insert videos and animations to show how our solutions work or to highlight our past projects. We can, in fact, turn our proposals into websites—multimedia, interactive presentations rather than written documents. With easily accessible and affordable technology, our proposals can be full-scale presentations—and, if we manage this transition well, we can even lower the cost of proposing and the time it takes for source selection.

What we cannot do, at least not alone, is decide how to put these new tools to work. Our customers specify what our proposals look like: how many pages they can be, what they must include, how they are to be submitted. Increasingly, customers are asking for paperless proposals—written documents submitted, and often reviewed, online or on disk. To a smaller extent, we are seeing forays into truly electronic proposals that incorporate multimedia tools. Some of our customers are adding electronic elements thoughtfully; others are using the new electronic toolkit to make a mess. For our own sake and for our customers' sake, we need to work together to define the best ways of putting these tools to work. To address this need, the Association of Proposal Management Professionals (APMP) established the Electronic Proposal Task Force in 2010. The task force's mission is to work with our customers to define what the electronic proposal can and should be, and to figure out how to get there.

If we agree that color, video, sound, and interactivity can tell a story better than black letters on white paper, then we must assume that electronic technologies will dominate the proposal business in the near future. Going electronic is something that can happen to us, or something we can manage in partnership with other participants in the proposal process. This article describes the task force's work to define the best and worst of what the electronic proposal has to offer, and it lays out a path for APMP to collaborate with our colleagues on the other side of the table to realize the potential of the electronic proposal.

1. The Specter of the Electronic Proposal

For most of us today, the electronic proposal is really just a written document that we submit as an Adobe Acrobat file or plain text. If, as scholar Marshall McLuhan wrote in 1964, the medium is the message, then the message of this paperless paper is simple: we are happy to save on printing and shipping costs, but neither buyer nor seller is interested in smarter approaches to communication.

This lack of interest is a mistake. Advancing from paperless to truly electronic proposals opens many new avenues for us to communicate our solutions. We can build hyperlinks such as an interactive compliance matrix into our proposals so the reviewer, in filling out the evaluation sheet, can find key sections readily. We can insert videos and animations to show how our solutions work, and to provide tours of our past projects. In principle, we can even invert and streamline the entire proposal process. Today we write, print, bind, and ship long detailed documents. The customer reads and rereads those documents and then selects a few finalists for face-to-face meetings. What if, instead, we submitted a brief video about our solution with a few pages of backup material, and the reviewer used that as the basis for deciding which competitors should be invited to submit detailed documents? The total cost and time that a competition consumes would fall.

There is a saying: "Tell me and I will forget. Show me and I may remember. Involve me and I will understand." Our longstanding way of doing business is to tell our customer about our solution, in writing. Using electronic media, we can embed audio and video to show the customer what we mean. In the way we organize and link our materials, we can make our proposals interactive to involve the customer in learning how our proposed solution is the right choice.

2. Navigating an Electronic Proposal Space

The electronic proposal environment must encompass everything that the hard copy environment does:

- Solicitation, Q&A, and amendments
- Communication of the proposed offer
- Submission (online or by shipping a disk or memory stick)
- Review and rating
- Award and management
- Debriefing.

Additionally, an electronic environment must address usability and flexibility. Facebook and Twitter have taught us new ways of communicating and collaborating among groups—models for the collaborative tools we need for proposals, and for the infrastructure required to share pictures and videos. These systems work with a wide variety of operating systems and computing platforms, from handheld devices to desktop computers.

Many government and private-sector approaches to handling these functions already exist, and many work well (Table 1). The bad news is that many of the systems have shortcomings that add challenges to the proposal process. In 2010 and 2011, the task force collected hundreds of comments from proposers and a few procurement people about the current state of the art, which we summarize here.

Solicitation, Q&A, and Amendments

The customer needs the ability to disseminate the solicitation, answers to questions, amendments, and ancillary documents such as proposer's guides or sample terms and conditions. If we were to design a "generic" system for these functions, it might look like Figure 1. As Table 1 shows, most online systems can per-

System	Solicitation	Q&A, Amendments	Write/Tag/ Compose	Submit	Review	Award	Debrief
Ariba	•	•		•		•	
BAVN (Los Angeles)	•	•				•	
FedBizOpps	•	1/2					
FedConnect	•	•		•		•	
Grants.gov	•	•		•			
NASA NSPIRES	•	•	•	•			
NIH ERA Commons			•	•	•	•	
NSF Fastlane	•		•	•	•	•	•
ORPIN (State of Oregon)	•	•	•	•		•	

Table 1. A sampling of existing online proposal systems and their functions.

RFP APMP1234: Provide Clever Ideas for the Way Forward on Paperless Proposals

Release date: 01 January 2011

Original due date: 03 May 2011

Current due date: 03 June 2011

Program Director: Name, contact

Administrative Point of Contact: Name, contact

Solicitation and Amendments

RFP APMP1234: Provide Clever Ideas for the Way Forward on Paperless Proposals (PDF, 637MB)

Guide for Proposers, October 2010 (PDF, 2.5MB) (Word, 3.3MB)

Standard Terms and Conditions (PDF, 1.3MB) (Word, 2.3 MB)

Amendment 1, 15 February 2011
Clarify technical requirements, clarify proposal submission requirements, and revise due date to June 3, 2011 (PDF, 350 KB) Click here to acknowledge receipt of amendment.

Amendment 2, 01 March 2011
Modify technical point of contact (PDF, 53 KB) Click here to acknowledge receipt of amendment.

Questions and Answers

Questions and Answers (February 15, 2011) (PDF, 125 KB)

Questions and Answers (February 23, 2011) (PDF, 67 KB)

Or, even better, a web site where all of the questions and answers are listed and searchable

Figure 1. A solicitation website should make the request and any ancillary documents available without an elaborate registration process, and it should clearly mark new materials as they are posted. Ideally, questions and answers would be on a website, searchable by keyword, rather than in downloadable files.

form all of these functions already, but many of these systems still need improvement. For example, the US Department of Energy disseminates solicitations and amendments through as many as three systems: FedBizOpps (www.fbo.gov), Grants.gov, and FedConnect.net. When an amendment is issued, it will appear on all three sites, but sometimes not on the same day, and often not with the same amendment number. The systems do not provide metadata to help the proposer determine what is new and what is not, so a proposer can waste hours downloading and comparing amended solicitations to be sure that the most current version is being used.

By contrast, the Department of Energy's Advanced Research Projects Agency for Energy (ARPA-E), which uses FedBizOpps, Grants.gov, and its own website for dissemination, does an excellent job of helping the reviewer find out what is new (Figure 2). Amendments are clearly labeled, dated, and summarized. During the time that a solicitation is "live," ARPA-E publishes an update of questions and answers every Friday on a searchable Frequently Asked Questions website. We can look to this system as a best practices model for these functions.

With some agencies and companies, gaining access to the solicitation itself can be an issue. Some online systems integrate the solicitation with the proposal submission module, and thus require users to register before downloading the Request for Proposal (RFP). This time-consuming and bureaucratic step is wasteful on public-sector proposals: The proposer should not register until after making a go/no-go decision. That, of course, cannot happen until the proposer has downloaded the solicitation and read it. Some systems let days pass before a proposal manager or subject matter expert has the approval to read the solicitation. This structure serves nobody's interests. (In the private sector, a registration step might be warranted if the RFPs contain privileged information. In those cases, a prospective bidder would see the RFP only after agreeing to honor confidentiality requirements.)

Communication of the Proposed Offer

It is, was, and always will be the customer's prerogative to specify what the proposer must prepare and submit. This implies an obligation to give the proposer sufficient space and resources to

MODIFICATIONS

All modifications to the Funding Opportunity Announcement (FOA) are highlighted in yellow in the body of the FOA.

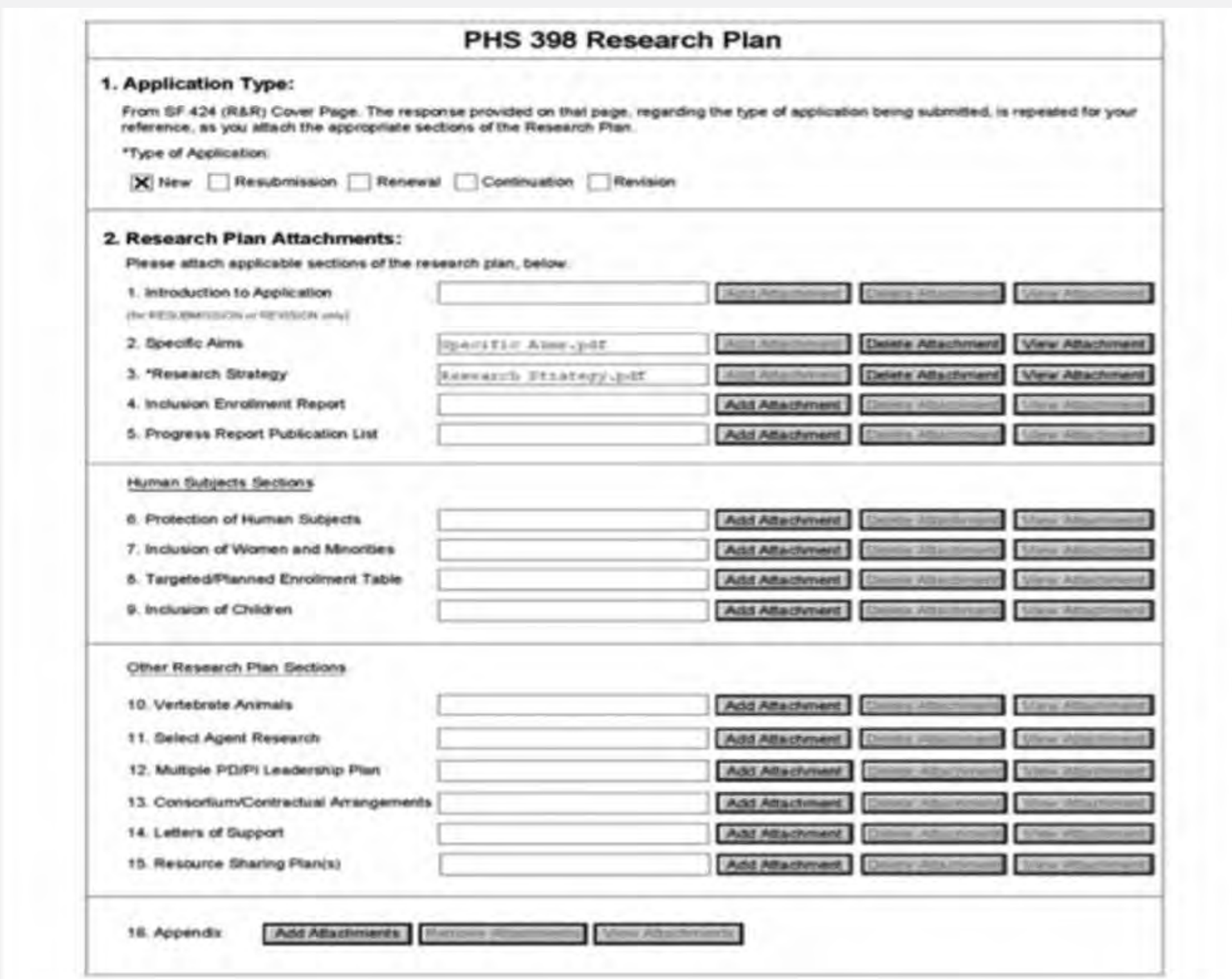
Mod. No.	Date	Description of Modifications
001	04/28/2011	• Deleted the phrase "with no more than 26 lines per page" from Section IV.B, third bullet, to clarify that Concept Papers should be single-spaced, not double-spaced. • Add the phrase "but less than 100%" in the Executive Summary under "Cost Share Requirement" and Section III.B.3, third bullet, to clarify that the minimum cost share requirement is 10% for Project Teams where domestic educational institutions, domestic nonprofits, and/or FFRDCs perform ≥ 80% but less than 100% of the work under the funding agreement, as measured by the Total Project Cost. • Modified footnote #25, on page13 in Section I.B.1 , to replace the reference to footnote #23 with footnote #26.
002	06/14/2011	• ARPA-E has revised the following sections of the FOA to provide guidance on required application forms, the content and form of Full Applications and Replies to Reviewer Comments, and the timely submission of applications: Sections IV.A, IV.C, IV.D, and IV.E and Appendix 2. In addition, ARPA-E has clarified its guidance on compliance criteria, evaluation criteria and program policy factors, Technology Transfer and Outreach expenditures, Commercialization Plans, award notifications, pre-selection communications, anticipated selection and award dates, and other topics in Sections III.A, III.C.1, IV.G.8, IV.H.1, V.A.2, V.A.3, V.B.1, V.B.2, V.C., VI.A.3, and VI.B.6. ARPA-E also added a definition to its glossary in Section IX of the FOA.
003	06/27/2011	• Narrowed the "Other Sources of Funding" requirement in Sections IV.C.1 and VI.B.9 of the FOA to focus on individuals (Principal Investigators, Co-PIs, and Key Participants) participating in the proposed project. Clarified disclosure requirements for Applicants selected for award negotiations.

Figure 2. When a solicitation is amended, the proposer needs to know that the amendment exists and what has changed. The US Department of Energy's ARPA-E does an excellent job of highlighting what has changed.

communicate the offer. This is an area where APMP and its members must work most closely with the customers as we agree on how to integrate video, animations, and other electronic features.

The ultimate end product of a proposal process is a package that communicates the offer and conforms to the customer's requirements. Many US agencies require the proposer to prepare the proposal in sections, and to upload those sections individually. The US National Institutes for Health (NIH), for example, require that a research grant proposal be broken into as many as 30 individual Adobe Acrobat files (Figure 3), which are attached in a specific order to a Grants.gov submission package. When the Grants.gov package reaches NIH's Electronic Research Administration (ERA) system, NIH's computer automatically reassembles the files, inserts pages numbers, inserts the principal investigator's name at the top of every page, and, significantly, adds hyperlinks at the start of each section so the reviewer can go to any section of the proposal with a single click. Years ago, APMP created the PXML initiative, which is analogous to what NIH has today—a set of standardized "tags" that could be inserted into proposals that reviewing software could pick out. The idea was that proposers and customers could agree on a standardized set of tags that could be inserted invisibly into proposals to serve as searchable bookmarks. Hypothetically, for example, the proposer would be able to insert a tag called <pastperformance> at every point in the document that deals with past performance. The reviewer then could do a simple search for these tags to find those passages. The PXML initiative was ahead of its time, but the NIH approach shows that it clearly was on the right track.

In the NIH example, only Adobe Acrobat PDF files can be inserted into the Grants.gov package. However, other Federal agencies allow other file types—notably Excel spreadsheet files, so reviewers can see and manipulate the proposer's budget. It should be a trivial matter, then, to enable submission of video files as part of a proposal. The only real issue is file size, since videos can be sizable. The US Army already puts language in its solicitations warning against the use of color pictures unless absolutely necessary, on the grounds that they take up more computer storage space than black-and-white images. Although it is generally accepted that computer memory is cheap, we must acknowledge that storage and sharing of large files can be a challenge—real or


PHS 398 Research Plan

1. Application Type:

From SF 424 (R&R) Cover Page. The response provided on that page, regarding the type of application being submitted, is repeated for your reference, as you attach the appropriate sections of the Research Plan.

*Type of Application:

[X] New [ ] Resubmission [ ] Renewal [ ] Continuation [ ] Revision

2. Research Plan Attachments:

Please attach applicable sections of the research plan, below.

1. Introduction to Application
2. Specific Aims — Specific Aims.pdf — Delete Attachment — View Attachment
3. *Research Strategy — Research Strategy.pdf — Delete Attachment — View Attachment
4. Inclusion Enrollment Report — Add Attachment
5. Progress Report Publication List — Add Attachment

Human Subjects Sections

6. Protection of Human Subjects — Add Attachment
7. Inclusion of Women and Minorities — Add Attachment
8. Targeted/Planned Enrollment Table — Add Attachment
9. Inclusion of Children — Add Attachment

Other Research Plan Sections

10. Vertebrate Animals — Add Attachment
11. Select Agent Research — Add Attachment
12. Multiple PD/PI Leadership Plan — Add Attachment
13. Consortium/Contractual Arrangements — Add Attachment
14. Letters of Support — Add Attachment
15. Resource Sharing Plan(s) — Add Attachment

16. Appendix — Add Attachments

Figure 3. An example of a Grants.gov package for the NIH. The proposer must break the proposal into dozens of individual files and attach them in a specific order. NIH's system reassembles them with page numbers and a link to the start of each section.

"Just about all systems now allow uploads of proposal sections in any order, and there are no restrictions on the number of times a section can be deleted and replaced before final submission."

perceptual. One recommendation from the task force is to set some standards for video. By controlling the window size and pixel density (say, agreeing that all videos will be displayed in a 4- by 6-inch window, which computers, iPads, and Windows tablets can easily handle), we can have our video without burying the customers in megabytes.

If customers' top worry is bloated files, public enemy #1 for proposers is that most austere of proposals, the plain-text, fill-in-the-blank format. Many opportunities require the proposer to submit a response only in plain text, usually with a limit on the number of words (or even characters) per section. Proposal people dread this. A proposal must communicate the reason that one option is better than another. Often, the best way to do this is through the use of tables and figures. Requiring plain-text responses implies a lack of seriousness or understanding and interferes with the mission of the proposal. Asking the proposer to describe its history, experience, and philosophy in 200 characters, including spaces, is just absurd.

Submission

Proposal submission is probably the most highly developed part of the electronic landscape today. Most systems have mechanisms for allowing and controlling access to the proposal and its submission. Some are online, requiring the proposer to upload each section of the proposal as a separate file (see, for example, the National Science Foundation's [NSF's] Fastlane system, the National Aeronautics and Space Administration's [NASA's] NSPIRES and NASAPRS sites, or ProposalCentral, a third-party system that many non-profit organizations use). Others, like Grants.gov, have a similar off-line process, where the proposals are prepared and attached to an elaborate PDF file, which is submitted, validated, and forwarded to the agency. Just about all systems now allow uploads of proposal sections in any order, and there are no restrictions on the number of times a section can be deleted and replaced before final submission. Many still require the proposer to retype budget information into an online template; some have advanced to making Excel files available for download, completion, and submission.

In the early days of online submission, some systems required uploads in a specific order, meaning that the proposer could not really see the requirements for section 3 until after completing the upload of section 2. This would lead to last-day ambushes when the proposer would turn a cyber-corner to find an unexpected requirement standing between the team and final submission.

Figure 4 shows a composite, generic online submission system. In one form or another, most customers already incorporate these functions into their systems.

An open question is whether an electronic proposal should be submitted online or on a disk or memory stick. Each approach has its advantages. Online submission can feed the proposal into the customer's review and award administration systems seamlessly. Submission of the proposal on a disk or stick puts the burden on the proposer to assure that the customer will be able to open and review it, and automatically limits the file size and disk storage requirements for the customer. Some customers, for

RFP APMP1234: Provide Clever Ideas for the Way Forward on Paperless Proposals

Proposal Management

Add/delete authorized users for this proposal

Validate and Submit

Check proposal for completeness

Enable your organization's Authorized Representative to submit the proposal

Disable your organization's Authorized Representative from submitting the proposal

Proposal Files

Cover Page Download blank form (fillable PDF)	Select and upload a file	View current file	Delete current file	Last updated May 31, 2011, 11:37 p.m.
Technical Volume	Select and upload a file	View current file	Delete current file	Last updated June 1, 2011, 3:43 a.m.
Administrative Volume	Select and upload a file	View current file	Delete current file	
Cost Volume	Select and upload a file	View current file	Delete current file	
Optional Attachment	Select and upload a file	View current file	Delete current file	
Optional Attachment	Select and upload a file	View current file	Delete current file	

Certifications

[ ] Acknowledgement of amendments (Or this could be integrated into the Solicitation page)

[ ] Acceptance of terms and conditions as set forth in the solicitation or

[ ] Attachment is provided taking exception to terms and conditions

Figure 4. A generic example of what functions an online submission system must have: access control, ability to upload the proposal, and a mechanism for submission by an authorized representative. The customer can build in representations and certifications as well.

no apparent reason, require combinations of online, on-paper, and on-disk submission. Sometimes, as in the case of some US Defense Advanced Research Projects Agency (DARPA) programs, the requirements border on the comical (Figure 5).

Review and Rating

Proposers rarely get a good look at the customer's review and rating systems. It is becoming clear that our customers are migrating to on-screen review in a variety of forms. In a broader sense, we are seeing people become more comfortable with reading documents on computer screens rather than on paper—starting in 2010, major retailers including Amazon and Barnes & Noble reported that e-books are outselling paper books.

As the electronic environment evolves, we should see tighter coupling of the proposal and review systems—and the time for APMP's PXML initiative will finally come. Proposal text will be tagged so reviewers can dig into it more effectively. Even video can be annotated: a reviewer can type or even speak comments, which the computer can record and attach to that particular frame as text.

Award and Management

As with the review systems, the award systems also can be integrated. The NSF's Fastlane system probably is the most seamless example today. Every proposal is assigned a number upon submission. That becomes the award number, and for the life of the award the grantee uses different Fastlane modules to submit progress reports and other communications.

Debriefing

The task force found few examples of electronic debriefing today. Again, NSF's Fastlane system automatically returns anonymous copies of reviewer comments to the proposer. Other systems should be designed to do the same.

3. The Issues

Both customer and proposer have expressed reservations about a proposal environment that uses more than just written words and static images. Key issues that have been raised with the task force are described below.

Cost to Propose

Small companies are concerned that the time and expense of producing videos will make them noncompetitive. Any proposal will consist, in some form, of a problem statement, a proposed solution, and a discussion of the approach and benefits of the solution. The solution can be built as an animation using technologies such as Adobe Flash or Microsoft Silverlight, which do not require any professional video equipment. But what happens if the big competitor hires Steven Spielberg to direct the video and the Broadway cast of Les Miserables to provide the background music? These are legitimate concerns, but probably not showstoppers. The cost of shooting and editing videos has dropped precipitously, as any teenager can tell you. Videos in proposals will likely be short clips illustrating key concepts or functions; we are talking about minutes, not hours, of material. They will need to be more professional looking than birthday party scenes on Facebook, but they will not have to be Hollywood quality. If we agree with our customers on some basic rules about format, we can keep the file sizes under control. And finally, if your big competitor hires an all-star cast to perform in its video, you can create an all-star cast of your own. If their narrator is Miss America and yours is an animated Albert Einstein, which proposal will send a better message?

It is likely that large and small companies alike will invest in some reusable video content, such as examples of past performance and company qualifications. Then less expensive tools can be used to create the customer-specific information. Any organization with a library of PowerPoint slides knows that this would not be a major leap in technology or expense.

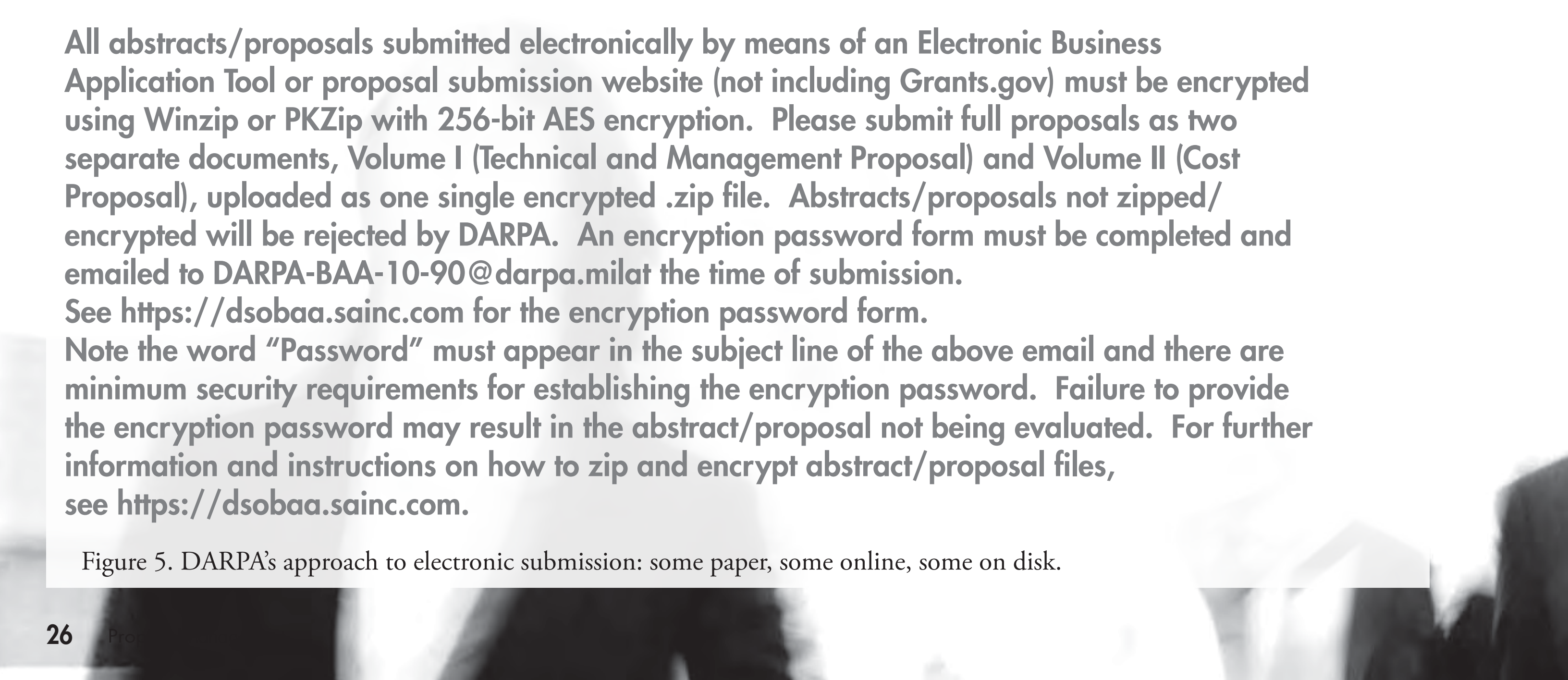

All abstracts/proposals submitted electronically by means of an Electronic Business Application Tool or proposal submission website (not including Grants.gov) must be encrypted using Winzip or PKZip with 256-bit AES encryption. Please submit full proposals as two separate documents, Volume I (Technical and Management Proposal) and Volume II (Cost Proposal), uploaded as one single encrypted .zip file. Abstracts/proposals not zipped/encrypted will be rejected by DARPA. An encryption password form must be completed and emailed to DARPA-BAA-10-90@darpa.milat the time of submission.
See https://dsobaa.sainc.com for the encryption password form.
Note the word "Password" must appear in the subject line of the above email and there are minimum security requirements for establishing the encryption password. Failure to provide the encryption password may result in the abstract/proposal not being evaluated. For further information and instructions on how to zip and encrypt abstract/proposal files, see https://dsobaa.sainc.com.

Figure 5. DARPA's approach to electronic submission: some paper, some online, some on disk.

File Size

As we mentioned earlier, customers are concerned about being buried in terabytes of proposals. Although computer memory is cheap, we must respect this concern. Two approaches are to agree on some standard size and pixel density formats for video, and to require submission of proposals on disk or memory stick rather than via upload to the customer's system. Similarly, the proposer can store the videos on its own website and provide links in the proposal; password protection can keep the competition from snooping.

The Review

It has been estimated that graphics communicate up to 60,000 times faster than text alone and increase understanding and recollection by at least 38 percent (see Parkinson, "Using Graphics in Page-Limited Proposals," http://www.24hrco.com/images/articles/html/ GraphicsPageLimited.html). As we mentioned earlier, the electronic proposal can accelerate the entire selection process. Rather than sitting alone and reading hundreds of pages from each proposer, reviewers can sit together and watch a short video while making notes in the margins of a brief written summary. It is conceivable that a review team can make the first pass through the proposals in an afternoon rather than weeks. Then they invite detailed full proposals from the most promising candidates. We assume that a written proposal will still be needed because, ultimately, contracts are written documents. The paperless or electronic contract is beyond the scope of this task force.

Since many US agencies already require or encourage submission of pre-proposals, no change in acquisition procedures would be needed—nothing in this scenario would necessarily violate Federal Acquisition Regulations. It is common for agencies to "encourage" or "discourage" submission of a full proposal, and to explain why. A discouraged proposer would still be free to go forward with a full proposal (despite the poor likelihood of success), and the agency would be obligated to review it.

Annotation

A question was raised about how the reviewer can make the equivalent of "notes in the margin" on a video. Technology does exist for this. Even without it, every video player includes a timer showing the minute and second as the video plays. If there is a question about a statement at minute 3:04, the reviewer can make a note for follow-up.

The proposer can make navigation easier by inserting chapters and bookmarks, just like those on commercial DVDs. This can help the reviewer go back to review parts of the submission.

4. How and Why

If the written proposal works, then why should we go to the effort of moving to electronic media? The most basic answer is that we have no choice. A proposal that incorporates moving pictures, sound, and interactivity will be more effective than a static written document. In a procurement process, our customers want to get to the right answer as quickly and efficiently as possible, and they will begin requiring these features whether we want to provide them or not. A genuine collaboration with our customers on the format is a way of adding value between APMP and the procurement community, and between participating companies and their customers.

Second, the electronic proposal can save money and speed up the procurement process. Yes, there will be costs associated with learning to become movie producers, but these are small: digital cameras are equipped to make high-definition video, and editing software is widely available. Those of us with no video experience will have to get it or hire it, just as many of us have specialists for graphics and pricing on our teams. For this investment, we can deliver a more powerful and memorable message to our customers, and the customers can get a faster and more effective selection process.

"A proposal that incorporates moving pictures, sound, and interactivity will be more effective than a static written document."

5. What Next

So how do we get from here to there? Incrementally.

First, let us work with our customers and their third-party, online systems to agree on some simple matters of proposal hygiene in the electronic environment, such as how to number amendments and how to make questions and answers searchable. This is easy.

Second, we can shake hands on some ground rules for including video in proposals, such as image size, pixel density, and maybe overall length of videos. We can come to some understandings, too, about how video should be provided: uploaded to the sponsor, provided on a disk or stick, or maintained on a password-protected section of the proposer's website.

Then we will be ready to throw the switch. Perhaps we can find a few customers willing to try out new formats on a few trial proposals. Non-competing renewals would be a good choice, since the medium would have no effect on the outcome. Some competitive opportunities might be modified to allow for submission of optional videos, either alongside a written summary or as a substitute for it. This would work best in a format that requires a pre-proposal.

Our key challenge is to engage with our customers so we have a genuine consensus on how to move forward. Over the next several months, the task force will be working with procurement officers and with other associations, including contract management and purchasing professionals groups, to build consensus. We invite your participation. APMP has established a "community" for the task force on its website (www.apmp.org), where we are posting updates and accepting ideas. We welcome your involvement.

Acknowledgments

The Electronic Proposal Task Force would not function without the efforts of Ruth Lown Turman, AM.APMP.PAMH, of Companion Data Services, LLC. She did not feel comfortable being listed as a co-author of this article, but her perceptive insights can be found throughout it.

Dozens of people have provided hundreds of comments about the best and worst of today's electronic proposal environment. They include Max Bernstein, of NASA, our first volunteer from the procurement side of the table; William Bishop; Chris Carter; Ruthmeri Gleason; Rachel Harold; Chris LaFountain; Jennifer Mauro; Donna Quesinberry; Charlie Smith; Jeanmarie Toler; and Carol Turpin.

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Establishing and Maintaining Bid Team Functionality

By Paul Gardner, AM.APMP, Jay Herther, PPF.APMP, and Joe O'Neill, PPF. APMP

Functional Teams are Winning Teams

Winning teams are usually highly functional, whether they are championship sports teams, victorious political teams, or successful bid (i.e., capture or proposal) teams. Losing teams, on the other hand, usually exhibit a high level of dysfunction. If we can identify these dysfunctions early in the life of the team and quickly respond, we can increase the team's potential to succeed. In the case of pursuing new business, this means increased Probability of Win, increased personal satisfaction of team participants, and reduced capture expenses.

Most teams operate as a self-contained mini-society, subject to internal and external influences. Patrick Lencioni's *The Five Dysfunctions of a Team* (2002) describes the workings of a team and how a team can become dysfunctional without even being aware of it. Lencioni's pyramid of dysfunctionality depicts the five dysfunctions. Taken from the opposite point of view, the pyramid here emphasizes characteristics of a team that enhance functionality. External forces on the team, coupled with internal stresses, tend to drive even a high functioning team towards a state of dysfunction or disorder. Capture leaders can use this information with a checklist of symptoms of dysfunctionality to establish and maintain their team's high functionality, on the path towards winning new business.

Most high functioning teams evolve to that state over time with nurturing, but teams are seldom born highly functioning. Good examples are sports teams, where a team may require several seasons to grow to a championship level. It is the exception that a high functioning team is put together literally overnight to become championship caliber within a single season.

A bid team is like any other team, but it typically does not have the luxury of time to develop and mature. Strict deadlines, limited resource availability, and the dynamic competitive environment make it critical to identify dysfunctions early in the life of the bid team. Once identified, the leader must act to negate those dysfunctions, and continually monitor the functioning of the team to look for and quell emerging symptoms of dysfunctionality.

Many team management advisory materials (i.e., books, seminars, workshops) describe the qualities of an effective team player. It is useful to understand what personal characteristics may make an individual a better team player. In the world of bid and capture management, however, the breadth of talent available and the time criticality of events mean the selection of team members is very limited. Of course, the ideal situation is to have a staff of bid specialists who are trained, willing, and able to form a highly functioning bid team on a moment's notice. This is akin to the Special Operations Forces, standing by and ready at all times for a call to action.

In the real world, most companies do not have the luxury of a standing army of business-winning professionals from which to pick. Thus, it is important for the bid or capture leader to manage the functionality of the team as a whole, regardless of the qualities of the individuals on it. In addition, individuals who exhibit qualities that are not effective as a team player may flourish in the supportive environment of a high functioning team.

Characteristics of Bid Teams that Breed Dysfunctionality

The nature of bid teams makes them particularly vulnerable to dysfunctionality. Bid teams typically begin with two or three individuals early in the capture phase, and expand, contract, and evolve throughout their lifetime. They are seldom stable for long periods of time. The nature of the competitive business environment, with core

According to Wikipedia,

"A team comprises a group of people or animals linked in a common purpose. Teams are especially appropriate for conducting tasks that are high in complexity and have many interdependent subtasks. A group in itself does not necessarily constitute a team. Teams normally have members with complementary skills and generate synergy through a coordinated effort which allows each member to maximize his or her strengths and minimize his or her weaknesses."

individuals supplemented by functional experts when needed, tends to make highly functioning teams more difficult to achieve and maintain without some form of nurturing. Among those characteristics that contribute to bid team dysfunctionality are:

- Team Composition – often high functioning individuals with limited team functioning skills and possibly differing agendas
- Operating Environment – volatile, subject to change, high stress
- Necessarily high expectations (must win!) – high stress – Gold Medal or nothing - no prize for second place
- External Influences – personal life and other factors outside the workplace that affect the functioning of individuals in the team environment
- Internal politicking – individual agendas and separate reporting structure that may be counterproductive to the team's stated agenda.

The effective capture leader is sensitive to these influencers and can maintain a high functioning team in the face of all these distracters.

Manage Team Composition

Team members typically are chosen for their subject matter expertise. They often are highly functioning individuals, but with limited team functioning skills. It is rare to have both qualities in one individual; those are called "proposal animals." Thus, the challenge for the capture leader is to maximize the individual's expertise while integrating him or her into the overall high functioning team.

Team members also may only be assigned on a short-term or part-time basis, often temporarily re-assigned from their "regular" "fun" job. Unless properly addressed, this could affect commitment, accountability, and attention to results of the bid team because the individual's underlying allegiance is to another team or project, and any conflict that arises will detract from the individual's functioning in the bid team.

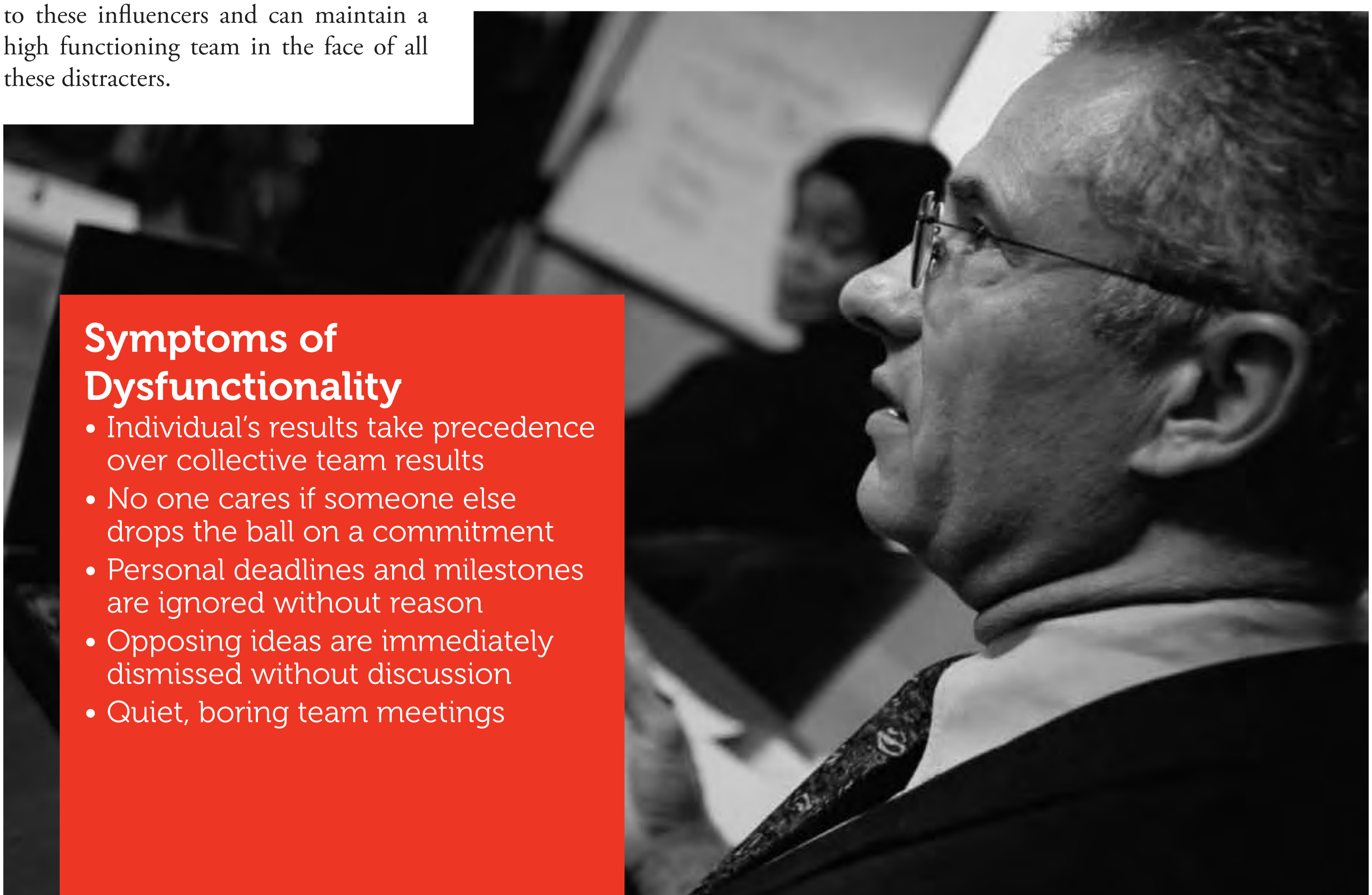
The personality and background of some team members, especially in a leadership position, may lead to lack of trust and fear of conflict on the part of other team members. So, these members should be chosen carefully. Often, there is no choice, thus challenging the capture leader to integrate each individual's functions into the team's total composition while maintaining overall trust and engaging in useful conflict.

Working in the Operating Environment

The environment in which a bid team operates can drive even a functional team towards dysfunction. High stress, tight and often volatile schedules, and team dynamics affect all levels of the pyramid of dysfunctionality. To best function in the typical capture operating environment, the team leader needs to address the impact at each level of the pyramid.

The operating environment consists of two major elements:

1. The physical location (where the team is collocated)
2. The psychological and emotional environment in which the team is operating.



Symptoms of Dysfunctionality

- Individual's results take precedence over collective team results
- No one cares if someone else drops the ball on a commitment
- Personal deadlines and milestones are ignored without reason
- Opposing ideas are immediately dismissed without discussion
- Quiet, boring team meetings

Manage Team Composition

- Ensure that team members understand and accept their roles, responsibilities, and expectations
- Address possible conflicts with other assignments and teams as soon as possible
- Frankly and privately address individual characteristics that may breed lack of trust and fear of conflict
- Hold team building early in the formative stages

Manage The Physical Envinronment

- Ensure everyone has a desk or workstation
- Ensure that equipment is as good or better than at the home office
- Provide a vehicle for individual feedback and comments for improvements
- Provide an overview of the facility, featuring the benefits, and communicate any specific rules to be followed
- Give a tour of the facility for the team moving in

Manage The Psychological Envinronment

- MBWA–Management by walking around–show a personal interest in what people are doing, especially after hours
- Use humor to lighten the air–funny video shorts at daily meetings work well
- Working for peanuts–bring around snacks for everyone
- Respect everone's opinion and resolve conflicts quickly and constructively

Leverage High Expectations

- Be specific and honest about expectations
- Insist on visible management commitment
- Relate expectations on a personal level
- Empower all levels of the team to make decisions

Manage the Physical Environment

Physical collocation for the capture team has long been proven to be the most effective way to work. Certain aspects of collocation breed dysfunctionality, however, and the capture leader must be on the lookout for these aspects and respond appropriately. There is a negative effect any time an individual is taken out of his or her normal operating environment. This effect is usually immediately intense, but if handled properly it dissipates with time.

Most individuals are uncomfortable with change; those on a bid team are no exceptions. Most people do not like to be relocated from their normal, comfortable office, and if told to do so, immediately resist, either outwardly or inwardly. The effective capture leader does not dictate or legislate, but must convince the individual that it is in their own and the team's best interests to be collocated for the duration of the proposal effort. Anecdotally, once they operate in a collocated environment, most former bid team members realize the resounding benefits.

The most convincing way is to show support to the team by ensuring that the physical collocation causes minimal disruption. Most major companies have proposal centers that are equipped with the appropriate equipment, computers, war rooms, and telephones, and with a small kitchen or break area. Use these if possible. Customize the center to be as much like the home office as possible. Also, provide incentives like meals, snacks, and drinks. If a permanent proposal center is not available, take the time to construct a temporary center, focused around a war room or club house.

Manage the Psychological Environment

Managing the psychological environment in which the team operates is critical to a high functioning team. The capture leader must be aware of the psychological state of the individuals as well as the team as a whole. Long hours, working away from the normal office, high expectations, and the natural conflicts that are a part of the dynamic capture environment can drive a team to dysfunction unless properly addressed.

The capture leader must make the psychological environment "tolerable" for the individual and the team. Daily meetings with a balance of structure and flexibility, coupled with a sense of humor and a system of incentives and rewards, can help to improve the psychological environment. The effective capture leader makes it "fun" to be a member of a bid team.

Leverage High Expectations

Since the capture of new and profitable business is critical to the health and even existence of the enterprise, the expectations laid on the capture team are extremely high. Some people thrive on the challenge of high expectations, but others become stressed to the point of dysfunctionality. The term "Must Win" is often used when referring to an important capture. In the business-winning field, as in championship sports, second place does not count. No one remembers who lost the Super Bowl. Thus, unless adequately addressed, high expectations could breed dysfunction.

High expectations, with the accompanying commitment of management and empowerment of the capture team, usually increases team functionality because the team members know that management is behind them. This breeds trust,

Compensate for External Influencers

- Recognize that individuals have lives outside the workplace
- Consider individuals' spouses in any incentive (sports tickets for two, dinner for two)
- Incentives on the spot, rather than long after the fact
- Award incentives in public
- Relate your own external influences to the team

Insulate the Team from Politics

- Advocate for the team members with their functional management
- Consider temporary re-assignment to the capture team for the duration of the effort
- Invite functional manangement to be a part of the capture process early in the effort

accountability, commitment, attention to results, and the ability to work through constructive conflict—all supporting increased team functioning.

On the flip side, high expectations, without the accompanying commitment and empowerment, can often drive the team towards dysfunction. A typical situation is when the team is ordered to win, yet is not given the required resources to implement the win strategy and not empowered to make decisions vital to the winning of the project. This dichotomy injects dysfunctionality at all levels of the pyramid.

The challenge for the capture leader is to welcome the high expectations, but demand or encourage an accompanying level of executive commitment. The successful capture leader must draw executive leadership into the capture team in some way. Some techniques that have worked include inviting executives to give a pep talk at a capture meeting, issuing an open invitation to attend any and all capture team meetings, and signing the win strategy statement or some other mission statement for the pursuit. Executive presence by itself can convey commitment to the team. It is amazing to observe the effect gained by an executive leadership walkthrough of the proposal area. Double the effect by scheduling the walkthrough on a night when everyone is working after-hours.

Compensate for External Influences

Even the most functional team members are influenced by outside factors. Among these factors are personal life, health issues, family issues, and outside hobbies and commitments. The capture leader must be sensitive to these influencers to keep them from impacting the bid team's functionality. The worst thing to do is blindly believe that the individual is immune to all external influencers—that is, has no other life but the bid team. Once external influencers creep into the equation, they are very difficult to overcome because they are usually the most difficult to alter, and they fester if untreated.

The experienced capture team leader recognizes and allows for the fact that everyone has external influences, and that the most productive individuals are those who are allowed to balance external influences with his or her bid team duties. Make it clear that you recognize that people have lives outside the workplace, and encourage those lives to be maintained. Humanize the team by using a few minutes at a daily meeting to relate your own personal experiences outside the office. If a holiday is involved, plan in advance and announce that the bid team will shut down for the holiday. Consider "other halves" in any system of rewards and incentives. For every extra hour a bid team member puts in at work, there is probably another "half" covering for him or her outside the workplace.

Insulate from Politics

The fleeting nature of the capture team means that team members are assigned on a relatively temporary basis. They seldom report directly to the capture leader, often reporting to functional managers who do not have a direct stake in the capture team's success. (Though, in the extreme situation, if the capture team is unsuccessful, the functional manager will have no one to manage!) Thus, the team member is often burdened by having two bosses and dysfunctionality creeps in to drag the team down if the goals of the two bosses are different.

The experienced, successful capture leader will become an advocate for members of the capture team, running interference for team members so they can dedicate their time and energy to the proposal. If the capture effort is expected to be extended—that is, six months to a year or more, consider temporary re-assignment of the team members to the capture leader. This direct-reporting relationship removes reporting conflicts for the duration of the capture. It also allows the capture leader to have a direct influence on the team member's periodic review, and creates the opportunity to include capture-specific performance objectives into the team member's annual review goals.

The Five Dysfunctions of a Team

Inattention to Results

Strategy for Overcoming

- Keep the team focused on tangible group goals
- Reward individuals based on team goals and collective success

Avoidance of Accountability

Strategy for Overcoming

- Explicitly communicate goals and standards of behavior
- Regularly discuss performance versus goals and standards

Lack of Commitment

Strategy for Overcoming

- Review commitments at the end of each meeting to ensure all team members are aligned
- Adopt a "disagree and commit" mentality– make sure all team members are committed regardless of initial disagreements

Fear of Conflict

Strategy for Overcoming

- Acknowledge that conflict is required for productive meetings
- Understand individual team members have natural conflicting styles, and establish common ground rules for engaging in conflict

Absence of Trust

Strategy for Overcoming

- Identify and discuss individual strengths and weaknesses
- Spend considerable time in face-to-face meedings and working sessions

Team Functionality Checklist

- [ ] Do they focus on achievement of collective results?
- [ ] Do they support and hold each other accountable for delivering to the plan?
- [ ] Do they demonstarte their commitment in decisions and action plans?
- [ ] Do they engage in unfiltered constructive conflict around ideas?
- [ ] Are they open and trusting with one another?

Achieving and Maintaining a High Functioning Team

It is far easier to achieve a high functioning team early in the team life and maintain that high functioning over time than it is to snatch a woefully dysfunctional team from the chasm of dysfunctionality and instantly make it even tolerably functioning. Two activities are crucial to achieving and maintaining high functioning teams:

- Dedicated Team Building, including the Myers Briggs Type Indicator (MBTI)
- Initial and Periodic Assessment of Team Functionality and Mid-Course Corrections.

Dedicated Team Building as the Foundation for a High Functioning Team

Once the team is born, some period of time should be dedicated to team building. The objective of team building is to maximize the functionality of the team. Because the capture team is dynamic, the capture leader needs to decide at what point it is a team (critical mass) so that the first team building can be implemented. Other team-building sessions may follow as the team continues to build during the various capture phases.

Myers Briggs Type Indicator (MBTI)

In a high stress environment, awareness of an individual's type preferences helps to communicate and understand how people interact with each other and with the team. The MBTI is an industry standard and useful tool to assess the individual's type preferences—that is, their preferential way of communicating and interacting. Understanding each individual's MBTI allows more effective communication within the team.

An MBTI "instrument" (the official name for the assessment of MBTI) should be administered at or before the initial team building. It is important that a certified MBTI provider administer the instrument so that they can discuss the results with the team in the proper context. Do not skimp here, as this is part of the foundation to a high functioning team. Investment here can pay dividends in the future because the results can be applied well beyond the capture and win.

Team Building and Initial Functionality Assessment

After the team has been together for a few weeks and has had a chance to interact, perform an initial assessment of team functionality. Use the questionnaire developed by Patrick Lencioni as a tool to assess the dysfunctionality of the team. If your company has a training and development department, they may be able to perform the initial team building and functionality assessment.

Periodic Re-assessment of Team Functionality and Mid-Course Corrections

Typical capture teams are fully staffed for three-to-six months, sometimes more. It is useful to periodically re-assess team functionality because of the dynamic environment and addition and subtraction of team members. Even the highest functioning team has the tendency to drift into dysfunctionality over time. Perform a quick, non-invasive check of team functionality using the "Symptoms of Dysfunctionality" checklist. This does not have to be a formal exercise, but can be done by observation during the daily course of events. Initiate a re-assessment using the questionnaire if you see that the team is beginning to exhibit some symptoms of dysfunctionality. Once the results are tabulated, go over them with the team and discuss mid-course corrections to get the team back on the course to high functioning. Mid-course corrections can get the team back on a track to high functioning

Conclusion

Like any championship endeavor, successfully responding to a competitive bid is a team effort. Championship teams are high functioning; losing teams are usually highly dysfunctional. To maximize your probability of a win and effectively use new business resources, your team must maintain high functioning throughout its life.

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Author Bio

The late Paul Gardner devoted 37 years to the proposal profession at Sanders Associates, now part of BAE Systems. He died at the age 59 in 2010 in the midst of writing this article.

The article was completed by two of Mr. Gardner's friends and colleagues, Jay Herther and Joe O'Neill, both PPF, APMP. They can be contacted at Herther3@comcast.net and oneill3@msn.com.

TEAM ASSESSMENT

This questionnaire is a straightforward diagnostic tool developed by Patrick Lencioni to help evaluate a team's susceptibility to the five dysfunctions. At the end of the questionnaire, there is a simple explanation of how to tabulate the results and interpret the possible conclusions. If possible, have all members of your team complete the diagnostic and review the results, discussing discrepancies in the responses and identifying any clear implications for the team.

INSTRUCTIONS:

Use the scale below to indicate how each statement applies to your team. It is important to evaluate the statement honestly and without over-thinking your answers.

3 usually

2 sometimes

1 rarely

1. Team members are passionate and unguarded in their discussion of issues. ______
2. Team members call out one another's deficiencies or unproductive behaviors. ______
3. Team members know what their peers are working on and how they contribute to the collective good of the team. ______
4. Team members quickly and genuinely apologize to one another when they say or do something inappropriate or possibly damaging to the team. ______
5. Team members willingly make sacrifices (such as budget, turf, head count) in their departments or areas of expertise for the good of the team. ______
6. Team members openly admit their weaknesses and mistakes. ______
7. Team meetings are compelling, and not boring. ______
8. Team members leave meetings confident that their peers are completely committed to the decisions that were agreed on, even if there was initial disagreement. ______
9. Morale is significantly affected by the failure to achieve team goals. ______
10. During team meetings, the most important–and difficult–issues are put on the table to be resolved. ______
11. Team members are deeply concerned about the prospect of letting down their peers. ______
12. Team members know about one another's personal lives and are comfortable discussing them. ______
13. Team members end discussions with clear and specific resolutions and calls to action. ______
14. Team members challenge one another about their plans and approaches. ______
15. Team members are slow to seek credit for their own contributions, but quick to point out those of others. ______

Absence of Trust	Fear of Conflict	Lack of Commitment	Avoidance of Accountability	Inattention to Results
Statements	Statements	Statements	Statements	Statements
4 + 6 + 12	1 + 7 + 10	3 + 8 + 13	2 + 11 + 14	5 + 9 + 15
Total ______	Total ______	Total ______	Total ______	Total ______

SCORING (Cumulative)

8-9 dysfunction is not a problem for your team

6-7 indicates that the dysfunction could be a problem

3-5 dysfunction needs to be addressed

Regardless of your score, it is important to keep in mind that every team needs constant work, because without it, even the best ones deviate toward dysfunction.

CATCHING UP WITH RICK HARRIS

By Chris Simmons

Rick Harris has been the APMP Executive Director since February 1, 2011. He is responsible for leading, planning, selling, and implementing APMP's mission worldwide for a growing membership that now exceeds 4,300 with 25 chapters in 68 countries. This article looks at Rick's progress to date and his outlook for the future. It explores some of the hot topics APMP members want to know about and provides some suggestions for what each of us can do to help him achieve his vision for our association.

WHO IS RICK HARRIS?

Rick is a senior-level association executive with more than 20 years' experience in creative marketing, government relations, staff management, and communications for professional and trade associations. Most recently, he served as Executive Director of the MdTech Division, Tech Council of Maryland, and the Executive Director, Tech Council of Maryland Foundation. His experience includes senior management roles working with both domestic and foreign economic development offices. He has been an integral part of international business development teams for several associations and has been successful in building global coalitions and developing new business opportunities.

Based in the greater Washington, DC area, Rick is responsible for leading and expanding our APMP operations and footprint worldwide. He officially became APMP Executive Director on February 1, 2011. Rick's first year has been a busy and productive one. He was instrumental in making two new strategic APMP hires (Director of Marketing and Communications, and a Membership and Chapter coordinator). In addition, he earned his Foundation Level accreditation, helped launch the APMP Global Salary Survey, rebranded the APMP Annual Conference, helped APMP achieve two Accreditation participation records, and attended 11 APMP events around the world.

NEW DIRECTIONS AND INNOVATIVE THINKING

Rick had some big shoes to fill when he took over as APMP Executive Director last year. The former Executive Director, David Winton, was the first and only Executive Director, serving APMP for the previous 18 years. Despite the legacy and significant contributions made by David Winton, Rick came to APMP poised to take a different leadership direction with new and innovative approaches to branding, membership growth, and operations.

I recently caught up with Rick to ask him some questions about his progress, upcoming APMP initiatives, and his outlook on the future. This interview includes Rick's responses and provides important insights into how his vision, leadership, and collaborative approach will take our association to new heights.

"Nearly 65 percent of APMP's members have achieved some level of accreditation across the Foundation, Practitioner, and Professional levels."

PROGRESS TO DATE AND CURRENT INITIATIVES

[Chris] What do you consider your biggest accomplishments in the past 12 months?

[Rick] While I am proud of a number of accomplishments, I have to remind our readers that our APMP Board members and staff have been instrumental in achieving or exceeding APMP goals in a number of areas including accreditation, transparency, conference branding, problem solving, and relationship building. Like any business, we focused on the areas that we believed needed the greatest amount of attention first and then went to work.

[Chris] Can you be more specific about some of these accomplishments?

[RICK] Let me address each accomplishment in order.

Accreditation. APMP's accreditation program is the industry leader and one of the best ways for employers and their staff to effectively measure best practice experience. The program has become one of APMP's most valuable marketing tools. This is a big difference from when we originally launched the program six years ago. Nearly 65 percent of APMP's members have achieved some level of accreditation across the Foundation, Practitioner, and Professional levels. Accreditation also drives APMP membership and has a direct bottom line impact on almost every APMP revenue line.

[RICK] We put a great deal of effort over the past year on accreditation marketing worldwide and the numbers of accredited members have grown significantly as a result. We refocused our accreditation program with the leadership of Cathy Day, the accreditation program's Chief Examiner; Kirste Webb, APMP's past CEO and an amazing accreditation advocate; and Betsy Blakney, APMP's previous CEO. Our team worked closely with Charlie Divine, APMP Accreditation Director, to remove business and administrative barriers and to get all the APMP Board members working together to promote the program. Our goal at the start of 2011 was to launch a tightly focused marketing campaign that integrated accreditation awareness under the personal direction of Charlie Divine. As a result of our efforts, we set two "best ever" accreditation records last year including 826 Foundation Level accreditations (an 18 percent increase over the previous year), and 82 Practitioner Level

Rick at home in Washington, DC with his two children Ryder and Riley.

accreditations (a 46 percent increase). We are all very proud of this achievement.

Transparency. The idea of creating a more open and transparent organization has, in many ways, been relatively easy to achieve. This could not have been possible without the APMP Board embracing the idea from the start and insisting on transparency at every management level. APMP members can confidently know that APMP's management, finances, plans, and practices are, and will always be, an open book. I am looking forward to sharing a State of the Association Annual Report with our members at a live presentation at Bid & Proposal Con 2012 and a printed annual report in the same timeframe.

Conference branding. The re-branding of our annual conference was a small, but very important accomplishment. We needed a conference name that communicated what our members do and who they are. If you are working in Chicago, Dublin, Bangalore, or anywhere else in the world and you see APMP, you might not know what we do. However, when you see Bid & Proposal Con 2012, you know what our conference is about right away. The new name opens the door to all those who might not know the association, but are familiar with the industry. When we launched the Bid & Proposal Con name and logo, we heard from speakers we had never heard from before. There was an excitement about the conference and its possibilities. Volunteers have lined up to help with the event. The re-branding has brought a renewed energy to our conference.

Problem solving and relationship building. A first-year association executive in any industry spends a lot of time solving problems and building relationships. I am proud about the number of people we brought back into the APMP and how we provided a voice to every member that wanted one. We debate issues in the open, and while I might not always agree with every member's point of view, I am proud that we listen and make decisions based on fairness and solid business principals.

[Chris] Have there been any major surprises or things that you didn't expect?

[RICK] I have been pleasantly surprised by the number of people willing to step forward and serve our association. In 2011, we issued a call for volunteers for the Technology Committee, the Accreditation Refresh RFP Selection Committee, the Commercial Advisory Committee, a number of Bid & Proposal Con 2012 Committees, and other volunteer roles. More than 100 APMP members volunteered and have served or are currently serving. We have received tremendous ideas from people like Capri Dye (Hubbert Systems Consulting), who is participating on our Bid & Proposal Con 2012 Marketing Committee, and Neera Kishore (Ericsson India) who, despite several time zone differences, helped select our conference speakers. Although these members don't serve on chapter boards, they have made a huge impact over the past year. Look for more invitations in your email or on the APMP Website for additional volunteer opportunities in the upcoming year.

[Chris] What have been your biggest challenges or obstacles to date?

[RICK] Change in leadership brings about new ideas and focus to an association like ours. Inevitably, there are changes in staff, management styles, and day-to-day operations. I am the type of person who is comfortable with change because I think the most successful organizations must change to answer marketplace and customer demands. Together with our APMP Board, we saw a great deal of change in 2011. We are moving forward and making changes to strengthen our business, our decision-making, and to manage APMP growth. However, change is difficult for some people and I respect that. I understand the anxiety of some our members and ask for their patience. As long as we are communicating, we will realize good growth and build a stronger association. I invite any member to call or email me directly if they are ever concerned about change in APMP.

[Chris] What major APMP initiatives are underway and what results do you expect for each?

[RICK] If 2011 was the year of APMP Accreditation, then 2012 will be the year for membership recruitment and retention. Through the years, APMP has done an outstanding job of recruiting new members but needs to strengthen its member retention efforts.

I personally know of three APMP chapters that spend a lot of time on membership retention—National Capital Area (NCA), the UKAPMP, and the Greater Midwest chapters. It is no surprise that two of the three are among our largest chapters.

APMP retention rates have been too low through the years, and we're going to focus on that and build it back up. With one email in December 2011, we brought back 137 members whose memberships had lapsed for more than a year. When they were contacted, a large number of members didn't even know their memberships had expired.

Rick listening intently at the UK APMP Conference in 2011.

"With one email in December 2011, we brought back 137 members whose memberships had lapsed for more than a year."

This year we are going to promote APMP, demonstrate value, and recruit and retain members like never before. We will measure ourselves with the same goals that we are asking for our chapters—a minimum of 5-10 percent growth.

WHAT MEMBERS WANT TO KNOW

In preparation for this interview with Rick, I started an APMP LinkedIn discussion inviting group members to ask questions about specific APMP areas of interest, issues, or concerns. The discussion generated a thread of approximately 25 entries, mostly related to accreditation, the commercial markets, non-US initiatives, APMP marketing, and APMP transparency. This section summarizes the principal questions for Rick from that discussion and a few related follow-up questions I developed. You can find and follow the discussion on the APMP LinkedIn group by entering "Ask Rick Harris" in the Search field.

[Chris] What are the benefits of APMP accreditation? Is it valuable for senior-level independent consultants? Are there any plans for changing the accreditation program to include more of a commercial focus? Has APMP thought about lowering the costs of accreditation?

[RICK] APMP's accreditation program is the global standard for bid and proposal managers to demonstrate their professional competency. By attaining the sequence of accreditation levels, members gain the respect and credibility of peers, clients, and the leaders of their organizations. Through rigorous accreditation testing and assessment, members improve their individual skills, bring the discipline of best practices to their teams, and enhance their company capabilities to win new business.

APMP's recently completed Global Salary Survey, showed that APMP accredited members earned 15 percent more than their non-accredited peers. That is a significant number and demonstrates the value of making the investment in accreditation.

Senior consultants should absolutely become accredited because it gives them a marketing advantage. I know consultants who highlight their APMP-accredited status to win work over consultants who are not accredited.

We currently have an accreditation refresh underway and are taking a broad look at all the competency levels. By broad look, I mean that we are surveying information from bid and proposal professionals in 50 countries from the commercial, government, and public sectors. If we find we need to update the program to include more of a commercial focus, we will. However, we want the accreditation survey data to lead us to that conclusion.

Currently, there are no plans to lower the cost of accreditation. I'll add that there are also no plans to increase the price. APMP has held the cost of accreditation at the same level for six years.

[Chris] Much of APMP's focus in the past has been on the Federal Government market. It finally seems like APMP is beginning to focus on the similarities and differences in the commercial market as well. What initiatives is APMP planning to support the commercial side of the market?

[RICK] Growing our commercial sector is important because APMP needs to be the home for all bid and proposal professionals. We need more commercial education, services, and other offerings that will attract this new audience of professionals who do what we do and are longing for a home like APMP. I give a large amount of credit to Robin Davis (Robin Davis Consulting) who, along with many others, has been advocating for APMP to build a commercial community. Robin chairs APMP's Healthcare Taskforce and we saw at last year's conference how powerful the commercial community is and how important it is to APMP. During our town hall meeting on the last day of the conference, Lauren Godoy (Michael Fina Company) specifically asked for my help in growing our commercial offerings.

I want Lauren, Robin, and the thousands of other commercial bid and proposal professionals to know that we listened. At Bid & Proposal Con 2012, we have a complete track with 12 commercial-specific education sessions. We have a growing Commercial Advisory Committee and we have several commercially focused Webinars planned throughout the year.

[Chris] It seems like APMP has largely been focused on English-speaking (Western) countries like the US, Canada, the UK, and Australia. What are APMP's plans to grow our membership in non-Western geographies? How is APMP valued in other geographies? Is APMP planning any specific programs or have any best practices to share from other cultures?

[RICK] We want to expand in areas where it makes the most sense. For the immediate future, we want to look to our colleagues in Europe to see how to serve them best. When I attended the UKAPMP Fall Symposia, it was refreshing to see how valued APMP is in Europe. Some of our largest accreditation growth has occurred in Europe because employers put a premium on APMP accreditation credentials for their staff. We would like to see that kind of energy replicated in the United States and Canada. As Jon Williams (Strategic Proposals) and David Warley (Bid to Win) will tell you, there is also significant interest for APMP in the Middle East, parts of Eastern Europe, and India. The entrée into those markets has almost always been made through APMP's accreditation program.

I have been encouraged by our ability to connect with other proposal professionals globally and believe that it is time to start sharing their best practices. Look for Webinars hosted by some of our European member companies to begin after Bid & Proposal Con 2012.

procurement, and more local marketing through our chapters.

We are targeting 5-10 percent annual APMP membership growth. APMP's new Marketing Committee will help develop the marketing tools, and it will be up to APMP staff and the chapters to use these tools creatively to accomplish that goal.

It's important for APMP members to know that we just added two new staff to specifically focus on our association's marketing and membership. Patrice Scheyer is our new Director of Marketing and Communications, and Lauren Williams is our new Membership and Chapter Coordinator. They are two seasoned association professionals who have been hired to help us grow our membership.

and Amy McGeady, current APMP CEO, we looked at all of our business practices with a particular eye on transparency.

We did this by posting, publicizing, and writing about APMP's internal processes. If members ask a question, we get them an answer. There is now an established process behind almost everything we do. When APMP hires a vendor, we put out an RFP like most other companies and then judge the responses based on a set of established criteria.

Although the Board looks to me for leadership and guidance, the Board makes all the business decisions. The minutes of those discussions leading up to these decisions are regularly distributed to our chapters.

"The Global Salary Survey showed that APMP accredited members earned 15 percent more than their non-accredited peers."

[Chris] What is the APMP's marketing plan to reach the thousands of proposal professionals not currently aware of the APMP and our value proposition? What are our membership growth priorities? Are they geographically specific? How are we approaching developed versus developing countries?

[RICK] The answer lies in one word: marketing. For years, APMP has quietly added its members through its chapter recruitment efforts and APMP Accreditation. That has worked to take us to 4,300 members but we have to be more proactive. Our APMP Marketing Committee will convene soon and develop innovative ways for more bid and proposal professionals to find out about our organization. This might include partnerships with like-minded associations, Web advertising, list

I also think it is important to review our pricing structure in developing associations and to make certain that we are priced correctly. Two clear examples of this review are in India and South Africa. We are working with both chapters to research prices of similar-sized professional associations in each area to see how APMP can be competitive with those prices to maximize memberships.

[Chris] What is APMP planning to do to increase transparency with our membership: for example, operating costs, board perks, decision-making processes, etc.? What is the best way for members to get more involved?

[RICK] When I first started at APMP, I knew we needed to be more transparent to our Board, members, and staff. Working with Betsy Blakney, past APMP CEO,

I think transparency begins with the individual member. When a question is asked, we answer it. When a decision is to be made, wear your APMP hat, discuss it openly, and make the decision. I am proud of APMP's current transparency and hope our members are too.

The best way for members to get involved is to watch our "call for volunteer announcements" or contact any staff member and just tell us you would like to do more to support this organization. I believe that it is important to find a way for anyone who wants to volunteer. We will find a home for you. Call or email any APMP staff member and we will get you connected.

[Chris] *The Journal of the Association of Proposal Management Professionals* [the *Journal*] and other APMP publications are

circulated almost exclusively to APMP members. Should APMP broaden and deepen the impact of its publications by making them available to nonmembers? If so, what ideas do you have for doing this?

[RICK] The *Journal* and the *Perspective* will always provide valuable benefits to members. We could make both available to non-members, but that would have an adverse effect on membership. If these publications were free, there would be two fewer reasons to become a member. As an exception, I know that APMP's Chesapeake Chapter is donating some overruns of the *Journal* to colleges and universities for their use. This is an exceptional idea.

I think members want to feel a part of a community where they can network, share ideas, and participate in education. That's where our focus should be. We need to create additional member benefits to increase the value associated with APMP.

[Chris] Some people think that APMP has lost some focus on the practitioner and suggest, for example, that the *Journal* publication should have more content on the art and science of our business. What are your thoughts on this and how does APMP provide best practices and lessons learned for the average member?

[RICK] A lot of associations would like to have a quality publication like the *Journal*. Our publication infrastructure is working. What we all need to look at is the content and that is what we are doing. We have a number of long-form articles in the *Journal* right now. Maybe our articles need to be shorter and focused more around best practices. There are a number of great ideas on the table right now on what a future *Journal* could look and read like. The *Journal* team is meeting now to look at the publication and to decide how it will read and what it looks like in the future. The APMP Marketing Committee will submit these ideas to the Board for their comment and recommendation in the near future.

Rick presenting his European initiatives at the UK APMP Conference in 2011.

[Chris] Many members believe they are underpaid based on the number of actual hours they work on proposals. What role should APMP have in promoting appropriate compensation and benefits for proposal professionals?

[RICK] I believe an association's role is to educate senior management at APMP member companies on the value of their proposal teams. This can be done through local meetings, conferences, office visits, and telephone calls. Conversely, I don't think it is the role of an association to come between the employer and the employee to advocate the amount of pay for an employee. That is a personal matter between employer and employee.

With our partner CSK Management in Switzerland, APMP has published its new Global Salary Survey. This publication is one of the most robust and informative salary surveys anywhere. I encourage all of our members to buy a copy at www.apmp.org. It is an investment in their personal achievement and a way to measure whether they believe they are growing within the organization. From a management perspective, it is a tool to measure how their compensation stacks up globally. We should continue to educate with tools like the APMP Global Salary Survey.

WHAT DOES THE FUTURE LOOK LIKE FOR APMP?

[Chris] What is your vision for APMP? How much can we grow? Where are the new frontiers for our group?

[RICK] My vision is to build the APMP brand so it is as synonymous to proposal, business development, and capture professionals as the National Association of Home Builders is to builders. There are millions of potential members throughout the world and we need to first make sure they know who we are. Then we can show them what we offer. Once they know us, we will dazzle them with our member benefits.

By building the APMP brand, getting out there and promoting, we're going to see greater growth in membership, our chapters are going to prosper, and our members are going to benefit. Building the APMP brand will tell everyone in our industry that they have a home, a voice, and a path for personal and professional achievement through their association. It all starts with building our brand.

We have done a good job of creating a great membership base here in the United States. Some chapters are bigger than others, but I look at every chapter as a path to greater membership. Whether a chapter has 1,000 members or 100 members, there is always room for more. Our greatest opportunity for expansion in the US is to build on what we already have. We need to collectively brainstorm a growth plan and provide the resources to execute the plan. Member recruitment tools might be different region to region, but the goal is the same: look for potential members wherever they are and introduce them to APMP.

Internationally, there are a number of potential hotbeds where we can establish a market and grow. I'm specifically talking about new markets like India, China and expanding our reach in Africa, Germany, and other parts of Europe.

APMP has slightly more than 4,300 members right now. I want to create an international membership plan that has 8,000 members in the next three years. When we accomplish that goal, we'll make a new plan for 10,000 members.

[Chris] The majority of proposal professionals around the world have either not heard of APMP or are not members. What can APMP do about that?

[RICK] It just gets down to better branding. APMP has to look at its current outreach campaigns and ramp them up. We have to look at how we are reaching out to our prospects. We do a great job touching current members. We have to build a plan for reaching prospective members. We need to build a national and international prospect list with the help of our members and chapters, design an outreach plan, and execute.

We need a promotional campaign designed to help us attract more members in existing companies and make inroads in companies that don't have any members. When our brand is stronger, our membership will take off.

APMP has so much potential for growth, and I am looking for every idea from every member to help grow their association into everything they want it to be. The key is listening to the members and hearing what they want. It's up to APMP staff to facilitate our members' wants and needs.

[Chris] Why should proposal professionals join APMP (today and in the future)?

[RICK] Because APMP is the center of influence for proposal, business development, and capture professionals globally—period. This is where you need to be if you are in our business.

Our dues are affordable and if you take advantage of our resource-rich association, you will save hundreds of dollars more than you are paying in dues. We have an excellent accreditation program, the best education and networking programs, and passionate chapter leadership and volunteers.

APMP members will soon find out that we are an association where every idea is entertained, and we put the best ideas into motion. You can be a part of that. We want your ideas. We invite you to join our community.

> "I want to create an international membership plan that has 8,000 members in the next three years."

HOW CAN WE HELP?

[Chris] What can APMP chapters do to grow and retain members?

[RICK] This is a great question and I have thought a lot about it. I have talked to many chapter chairs and for the most part, they all want their membership numbers to increase. Some are even apologetic for the number of members they have.

I encourage every APMP chapter to embrace their current membership number. Be proud of that number and join with me in a plan to grow your chapter's membership. That short-term growth plan has to start with building a prospect list. We can sign up members when we

"The key is getting and staying engaged somewhere in APMP... if any member is reading this right now and wants to get involved, please email me at: rick.harris@apmp.org and I'll help you find a place."

have an at-the-ready, identifiable, qualified list to market to.

For example, if a chapter has 50 members, embrace it and make a plan to grow it by 10 percent the next year. That's only five new members a year. When chapters build and work a prospect list with a target growth rate, they inevitably end up with more members than planned.

Retention is a different story. In my mind, the key to membership retention is continually engaging the member as many times as you can throughout the year. We do this through traditional channels like education events, but need to continue thorough consistent emails and follow-up telephone calls to see how these members are doing and what they want or need.

There isn't a single chapter that is going to be in this alone. I'll be right there with them to help with measured growth. And we're going to start it all with a member prospect list and celebrate the success. We're going to acknowledge success at every opportunity.

[Chris] But some chapters have limited budgets. What is your advice for new or smaller chapters in terms of marketing initiatives to grow membership?

[RICK] Marketing is a priority this year and the Marketing Committee will produce promotional material for every APMP chapter to use for member recruitment and retention. We want all APMP chapters to operate from a level playing field in that they all have the same marketing materials to use. If we want the chapters to grow membership by 5-10 percent, then we have to give them the tools and the materials to do it.

The materials will include a list of member benefits, a PDF brochure on the association and its offerings, and a PowerPoint presentation on how to get the most from APMP membership. All of these will be available on the Web for chapters to use.

At Bid & Proposal Con 2012 this year, we are having our first full-day Chapter Officers Leadership Workshop where we will be working with chapters to identify marketing needs to get them the help they seek. In addition, we will work with chapters to help strengthen their succession planning and other areas that will lead them to growth.

We are providing better support to our chapters and will continue to do so this year with marketing materials that every chapter anywhere in the world can use.

[Chris] What advice can you give individual members for them to get more value out of their membership? How can individual members help you be successful?

[RICK] The key is getting and staying engaged somewhere in APMP. It is always interesting for me to learn why people become members of associations. They will tell you everything from wanting to network, advancing their career through accreditation, or sharing best industry practices with peers. The one thing they all have in common is that they are engaged in the association in one way or another.

The most important thing to do is to pick something within APMP to do. Our staff can help you do that. Get involved in some part of the association and I guarantee that your interests will grow and your dues dollars will be maximized.

If any member is reading this right now and wants to get involved in APMP, but doesn't know where to start, please email me at rick.harris@apmp.org and I'll help you find a place.

Author Bio

Chris Simmons is the former vice president and board member of the NCA chapter (2008-2011) and regular contributor to the APMP *Journal*, *Perspective*, and the NCA eZine. He is the founder and principal member of Rainmakerz Consulting—a business development solutions company specializing in all aspects of proposal development. Contact Chris at chris@rainmakerz.biz, 202-255-2355, or visit www.rainmakerz.biz.

Upgrade to Free: The Best Free and Low Cost Online Tools & Apps

Beth Ziesenis

TSTC Publishing, 2011

$10.14

www.askbethz.com

by: **Rick Harris**

In the 1970s it was Strunk and White *Elements of Style*. In the 1980s it was the *New York Time's Manual of Style and Usage*. In the 2000s, for me anyway, it is *Upgrade to Free: The Best Free and Low Cost Online Tools & Apps* written by Beth Ziesenis and published by TSTC.

The first two aforementioned books helped me hone my writing skills, and I still use them today. I have found *Upgrade to Free* to be every bit as useful as *Elements of Style* and the *New York Times Manual of Style and Usage* because it gets used as an idea generator. *Upgrade to Free* is one of those books that improves your business skills and creativity by offering 219 pages of free or low-cost applications (apps) for your computer, smart phone, and tablet. It is a little book with a lot of resources.

If APMP's own COO and App Maven, Beth Wingate, had written a book, this would be it. She will be presenting a similar session at Bid & Proposal Con 2012 on Wednesday May 23rd from 1:00 to 4:00 PM in a session called Best of App Maven: PC/iPad Tools and Apps that Deliver on a Shoe String Budget.

Upgrade to Free is billed as "…your guide to apt applications for your computer, as well as your smart phone, to make your life easier." Whether it is alphabetizing a list, organizing a meeting or even an app that scans through your computer to find and delete large files to make room on your hard drive, Ziesenis has found an app that can make any part of your computer life easier and less complicated."

And it does. This is one of those little gems on the bookshelf that gets at least a-once-a-week viewing for its uncanny ability to offer hundreds of cost-saving solutions and new ideas on how to work smarter, faster, and cheaper. You have the opportunity to save your company money while using the most dynamic communications tools. If it is smart to have a few secret weapons in your business arsenal, *Upgrade to Free* is the bunker buster.

"This is one of those little gems on the bookshelf that gets at least a-once-a-week viewing for its uncanny ability to offer hundreds of cost-saving solutions"

What I Like About *Upgrade For Free*

One of the unique things about this book is that Ms. Ziesenis scuttled the normal book introduction and went instead with a 12-question summary of what you should ask before reading the book. She tells us why she wrote the book by answering questions on why she wrote the book, and dispels the myth that the tools are outdated as soon as the book is written. She also convinces the reader why non-gadget and non-computer geeks should read it, and describes how to avoid computer Internet tools that are a scam. Finally, she promotes her Website where she electronically updates new and emerging tools in between printings.

The reader is able to instantly connect with the author through her non-traditional introduction and dive into a list of questions that essentially tells them why the book is important without the normal "introduction preach."

Upgrade for Free is also professionally presented and efficiently organized, which makes for simple research long after it is purchased. Each chapter is organized in the same way that you might use a search engine for category help. For example, if you need free program apps to help with your daily productivity, it is as easy as looking at the chapter heading. Each chapter is accompanied by a two-to-three paragraph rundown and suggested apps

"I have found Upgrade to Free to be every bit as useful as Elements of Style and the New York Times Manual of Style and Usage because it gets used as an idea generator."

including the pages where they can be found. This lets the reader quickly scan the chapter heading pages and move right into the app reviews. This is a feature that I use regularly to look for solutions to new technology challenges.

For example, Chapter 7 is for Photos and Fonts (page 73) and quickly directs me to the app Dafont, www.dafont.com, an app that allows me to download "fun and funky fonts for the occasional headline that might require one." Every app is featured in its own box, along with a note if it is FREE (or if it has a nominal cost) and an app description that touts its best attributes.

There are a total of 22 chapters featuring dozens of low-or-no-cost resources in sections such as personal organization tools, small business tools, meeting planning tools, project management tools, IT tools, and more.

What I Would Like To See Improved on the Next Printing

At times, I found that some of the "free" suggestions offered in the book were "light" versions of apps that would perform better if you paid for them. The proliferation of computer apps has made marketing them a competitive sport. Some software developers will offer you something for "free" to bring you closer to the app and then charge for the "full version." Though not many, I was hoping there would be fewer of these. Ziesenis warned us in the introduction that this was likely, but the next printing would be helped out by fewer of these "upgrade for better performance" apps.

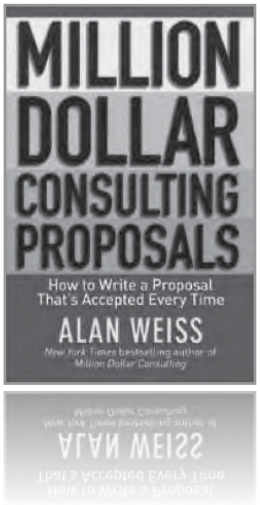
As professionally laid out and easy to read as this book is, there was one serious layout and design flaw. *Upgrade For Free* used a handwritten font that seemed out of place in a business book. The handwritten font was on the cover, every chapter page and sprinkled throughout. I thought this font detracted from the overall design value of the book.

Overall Impression

Upgrade to Free: The Best Free and Low Cost Online Tools & Apps is not only a book—it is a resource. No matter the task, there is most likely a corresponding, low cost solution. It is a fast read but an invaluable resource and wonderfully priced at less than $12 a copy. Invest in this book, and you will find an advisor on the bookshelf and you could become a hero in your office. Even though there is a possibility that you have heard of some of the apps in *Upgrade to Free*, you will be amazed at all the new apps you have never heard of that you will soon be using every day.

"It is a fast read but an invaluable resource and wonderfully priced at less than $12 a copy."

Rick Harris is APMP's Executive Director and enthusiastically promotes the professional growth of APMP members by advancing the arts, sciences, and technologies of winning business.



Million Dollar Consulting Proposals: How to Write a Proposal That's Accepted Every Time

Alan Weiss

John Wiley & Sons, Inc. 2012

$24.95

by: **Jeannette K. Waldie, PPM.APMP**

Million Dollar Consulting Proposals is written for a very specific type of proposal—one for independent consulting services. Alan Weiss provides clear suggestions on selling and proposing services directly to buyers. A proposal, for the purposes of this book, means a letter that summates an agreement for services.

The majority of the book deals with strategies, including how to identify clients, how to get past the gatekeepers, how to define and access real decision makers (what Weiss calls "the economic buyer"), how to determine clients' real needs, how to establish trusting relationships, how to present a proposal and have your solution accepted, and how to plan for the unexpected. There is one chapter that deals with Requests for Proposals (RFPs). As the author puts it, "My advice is to refrain from responding to most RFPs unless you can easily make the case that you are a sole-source provider . . ."

I found the sections that dealt with getting past gatekeepers and preparing yourself and the client for establishing value and defining the results particularly informative. The author gives a clear case on the importance of value compared to price, and on how to structure your solutions to provide various alternatives from which a client can choose. I also enjoyed Section 4, The Architecture of Proposals, which is one of the best examples of a letter proposal I have found. The author also includes guidelines for invoices and statements, and for follow-on communications.

Alan Weiss goes beyond the proposal phase in this book. He provides techniques for dealing with retainers and improving your proposals to maximize your success. Sample proposals at the end of the book cover several scenarios, and short Case Studies scattered throughout the book provide examples of the scenarios discussed. It is refreshing that Mr. Weiss includes case studies of both failures and successes!

Although not suitable for many proposal professionals, anyone who is considering becoming a consultant or is involved in business development or capture planning will find value in this book. I plan to keep it on my bookshelf for the day I retire and become a consultant.

"I found the sections that dealt with getting past gatekeepers and preparing yourself and the client for establishing value and defining the results particularly informative."

Jeannette K. Waldie, PPM.APMP, is an APMP member and past President of the Greater Houston Chapter. She has managed proposals and small proposal centers for the federal and commercial markets for 20 years, both for companies and as a consultant. She can be reached at jeannette.waldie@att.net.

Spiraling Up: How to Create A High Growth, High Value Professional Services Firm

Lee W. Fredericksen and Aaron E. Taylor

Hinge Research Institute, 2010

$15.56

by: **Rachel Brightbill**

Spiraling Up is an insightful compilation of four market research studies. The studies were performed for the professional services industry over a three-year period by a Hinge, a national branding and marketing firm. Authors Lee W. Fredericksen and Aaron E. Taylor provide best practices and interesting anecdotes when presenting the research findings. The findings establish a framework for professional services firms to adopt business practices used by some of the most successful high-growth firms.

One may wonder if the authors can really present three years of information clearly in less than 200 pages. Through the use of clear, no-nonsense language and minimal filler content, Fredericksen and Taylor manage to get their points across and offer helpful tools for professional services firms to use when striving to become high-growth firms. Compared to other books in this genre, which tend to lack useful details and examples of real-world applications, *Spiraling Up* stands out: it provides a wealth of information that can be easily and quickly applied by any professional services firm.

Fredericksen and Taylor originally intended to use their research projects to enhance their own business. Over the course of the three years it took to conduct and report the research, however, they noticed significant trends in high-growth professional services firms, and they decided to explore those trends further. The firms represented a group that grew more than nine times faster than average and were 50 percent more profitable, while at the same time spending less than average on sales and marketing. Those firms encompassed several professional services industries, including Accounting and Finance, Architecture Engineering and Construction, Management Consulting and Outsources Services, Technology, and Government Contracting.

Each chapter of the book is dedicated to a key piece of the compiled research, beginning with best practices on how high-growth firms position themselves in the market and the tactics they prefer to use versus the tactics of their average-growth competitors. The book goes on to discuss five consistent value drivers for the high-growth firms, including the importance of existing contracts in driving value. Fredericksen and Taylor conclude from their research that existing client contracts do more than just drive revenue for a firm. "If clients are willing to enter into multi-year contracts, two other things must be true. First, the client expects they will have an ongoing need. Second, they believe the firm will be able to meet that need better than anyone else."

> *"Through the use of clear, no-nonsense language and minimal filler content, Fredericksen and Taylor manage to get their points across and offer helpful tools for professional services firms to use when striving to become high-growth firms."*

"While I felt that this book was very insightful, in a few sections the information presented seemed to be common sense—but perhaps we need to be reminded of common sense business practices when moving our businesses forward."

The book goes on to discuss findings about how and why customers buy professional services. I found it interesting that there is little overlap between who a firm perceives as its competitors and who surveyed customers say the competitors are. There is a significant gap, with 80 percent of a firm's competitors not on its radar, and firms that can break into that competitive landscape have a huge advantage in the market.

Client nurturing, which should be an obvious requirement for building existing relationships, turned out to be a marketing and business development initiative that is not being taken advantage of by average firms. When it comes to business development and marketing, efficiency is the key. While high-growth firms spend less in this area, the efforts they do make are much more streamlined and tactical than those used by average-growth firms.

Some of the most useful information appears at the end of the book: Fredericksen and Taylor provide marketing and business development resources and tools, including top blogs and a self assessment that readers can use to spark questions and generate ideas to improve their businesses.

While I felt that this book was very insightful, in a few sections the information presented seemed to be common sense—but perhaps we need to be reminded of common sense business practices when moving our businesses forward. I think this is a must-read for anyone involved in a professional services firm's marketing and business development, even if it simply reinforces what is already being done to make one's firm successful.

"Some of the most useful information appears at the end of the book: Fredericksen and Taylor provide marketing and business development resources and tools, including top blogs and a self assessment..."

Rachel Brightbill is the Federal Field Marketing Manager for VMware. She has more than seven years' experience in marketing and event planning, strategic campaign development, search engine optimization, and Web analytics. She can be reached at rbrightbill@gmail.com.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Hope is Not a Winning Strategy... But Price to Win (PTW) Is!

Anthony C. Constable

Avenue Design, Inc. 2011

$223.13

by: **Jim Hiles**

Tony Constable came to the US from the United Kingdom in 1968 as a computer programmer and worked in this capacity for a number of firms. While developing technical solutions for major defense contractors, he came to the realization that good technical solutions could only win if they were supported by competent management approaches. Tony's pursuit of excellence in management approaches in turn resulted in his devout attention to the "final frontier for capture success"—pricing, which he has been a student of since the 1970s. Tony is a humble man who maintains his youthful accent and energy. His reference to himself as a student of pricing and price to win is an incredible understatement. *Hope is Not a Winning Strategy* is a brilliant articulation of his life's work and philosophies, and at no point does Tony disappoint with this publication.

Hope is not a Winning Strategy is not a book for beginners to the world of new business capture and proposals. This book is written for advanced practitioners in the pursuit, capture, and pricing of proposals to the Federal Government. As a matter of full disclosure, I must admit that I was thrilled to see that in 2011 the author had published this work. I had attended a full day price-to-win workshop led by Tony approximately five years ago. I have diligently worked to price winning proposals and apply his principles. I felt that I knew the main players and methods in this relatively small and somewhat closely held domain, and held the author's disciplined and thoughtful approaches in high regard. When I asked him why he published this volume, he stated that in the approximately seven years that he has been doing the seminar, he has probably reached three or four thousand people. By publishing in a book format, it is Tony's, (the price-to-win evangelist) hope that perhaps the number of people enlightened by the ideas in *Hope is Not a Winning Strategy* can be increased by a factor of ten. I hope he is right and achieves this worthy goal.

The primary sources for *Hope is Not a Winning Strategy* are the numerous and varied experiences of the author, those who have worked in and with his firm, and the interactions in the many seminars he has conducted on this subject. The writing style, motivations, and methodologies are all made very clear, starting with Tony's three-phase, ten-step price to win framework. This framework provides capture teams with a detailed definition of their competition, an explanation of

> *"One of the highpoints of Hope is Not a Winning Strategy is the number of original and key concepts that are fully explored and explained."*

> "*Hope is not a Winning Strategy* is not a book for beginners to the world of new business capture and proposals. This book is written for advanced practitioners in the pursuit, capture, and pricing of proposals to the Federal Government."

how the competitors are most likely to approach acquisition of business opportunities, and a well-supported assessment of where the competitors are likely to price their offerings.

The layout of *Hope is Not a Winning Strategy* is logical and orderly. All terms are clearly defined. There are numerous detailed and clearly labeled graphics that are genuinely helpful in enhancing reader understanding of key concepts. A complete index is included, along with a glossary of terms. The layout of the book and a "how to use this book" section are helpful tools to obtain maximum utility from this volume. The last section is a detailed, 20-page exercise that takes the reader step-by-step through application of the 3-phase, 10-step model to a hypothetical opportunity. Completed pricing tables are included, rounding out everything needed to run multiple pricing scenarios against the hypothetical opportunity and compare application and results to the "textbook answer."

One of the high points of *Hope is Not a Winning Strategy* is the number of original and key concepts that are fully explored and explained. One of these key concepts is price as an independent variable, where a price to win is developed and held as an independent variable (as opposed to the more common practice of price being produced as a dependent variable) with the focus of the capture team's effort being placed on how to deliver the solution at the predetermined price to win.

Another key conceptual frame put forth is a price to win maturity model. The model has four maturity levels, which are explained in detail. True to the level of detail and integration of the other concepts presented, the price-to-win maturity model is presented in a manner that makes it clear to readers how to self-assess where their own pricing practices are against the levels in the model, and how to implement and use the price to win concepts in the book to increase their own level of price to win maturity. To the best of this reviewer's knowledge, there are no competing or alternative frameworks of this sort dedicated to categorizing and assessing price to win maturity. This maturity model represents a significant and noteworthy contribution to the field of pricing.

The writing style used is entertaining and lively, with liberally used allegories, metaphors, and tongue-in-cheek humorous anecdotes, such as the author's use of "catch 'ems" and "skin 'ems" to refer to two types of groups in firms, or the note calling for price to winners to remind capture teams that their purpose in life is not to borrow the capture team's watch to tell them what time it is.

Hope is Not a Winning Strategy is a welcome addition to the small body of literature available on pricing for the government contracting market, and has a considerable amount of insight and practical guidance for solution and pricing developers in other markets. The author's objectives have been amply met with publication of this important work, making *Hope is Not a Winning Strategy* a must-read for capture managers, business developers, and others involved in pricing to win.

Jim Hiles 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, serves as The APMP *Journal* Book Review Editor, and is Co-Chair of APMP's Bid & Proposal Con 2012.

How to Avoid Proposal Missteps:
17 Mistakes that Broadcast Hidden Negative Messages Which Dramatically Decrease Your Federal Contract WIN Probability

A. L. Heisig

Self-published, 2011

$9.95

by: **Jim Hiles**

"The title of this short work neatly summarizes the author's intent, which is economically achieved in the ensuing 66 pages."

Alan Heisig is passionate about proposals. Passionate about helping firms overcome using their proposals to undermine their own prospects of obtaining high scores during Federal proposal evaluations. The title of this short work neatly summarizes the author's intent, which is economically achieved in the ensuing 66 pages.

Alan's observations are neatly encapsulated in 17 "mistakes" arranged in four categories of "errors" that represent the manifestations of the 17 mistakes. The presentation is nuanced and unique in this regard in the genre of "deadly sin list" proposal books. The nuance being the inference made regarding what the proposal evaluator will perceive based on the proposal mistake. As an example, the author starts with the proposal mistake of a lack of a coherent message. From this, there is a chain of events or ripple effect that looks like this:

- Your proposal lacks a coherent message
- Perceived lack of leadership direction at your company
- Lowered confidence in your corporate ability to execute a contract
- Greater risk assigned to your contract
- Low evaluation score.

This specific of a chain of events is only presented for one of the 17 mistakes, and is inferred for the rest in the categorization scheme used to organize all the mistakes. My immediate reaction to the chain of events logic presented is not doubt that a proposal's lack of a coherent message will potentially contribute to a lower evaluation score; rather, my reaction is that it is a fairly substantial leap to speculate on the specific intermediate perceptions evaluators will form in reaction to any particular proposal attribute. Offsetting this doubt is a willingness to rely on the deep experience that the author has undoubtedly accumulated in proposal evaluation during his many years of military and government service.

How to Avoid Proposal Missteps is intended for responses associated with best value or trade-off source selections. This is indicated by the author's description of proposal evaluation as based on two processes, including "assigning objective scores to proposals…which are then weighted by risk-based perceptions." *How to Avoid Proposal Missteps* also is intended for an audience of proposal managers, as indicated by the types of issues addressed by the mistakes. The author categorizes the mistakes into four error groups:

- Errors indicating directionless leadership
- Errors signifying poor organization
- Errors demonstrating lack of control
- Errors revealing pathetic planning.

These are harsh indictments to hear.

> "*How to Avoid Proposal Missteps* is intended for responses associated with best value or trade-off source selections."

Submitting information that was not requested (for example, mistake #12) in your proposal indicates that your firm has a lack of control. What federal proposal manager has not struggled with a mismatch between the proposal instructions and the evaluation criteria in a solicitation that provided little room for choice other than to include information not specifically requested but needed to address both the evaluation criteria and the proposal instructions? On the other hand, the author's provocative presentation technique boldly expands the conversation beyond the usual domain of the proposal manager and immediate management environment.

The mistakes highlighted in the book provide a basis to engage in thoughtful conversation and respond to challenging proposal conundrums commonly encountered. Even though the harsh indictment aspect of the four error categories are chains of events linked back to a firm instead of to a proposal, it seems unlikely that it is presented that way for other than dramatic effect, even though the author does not make the usual note that proposal evaluations by the Federal Government are meant to evaluate only the submitted proposal.

The provocation regarding avoiding proposal missteps is the book's major strength. The author appears to have relied on his own experience as his primary source. The 17 mistakes do not represent comprehensive research and contribute to the book's main weakness—that the 17 mistakes and categories are primarily compliance issues such as "turn your proposal in on time," with a few categorizable as proposal or solution differentiation and win themes.

I enjoyed the book and an engaging discussion with the author. I am encouraged by the dedication and energy that Alan puts into his work and his passion for helping firms prepare winning proposals. Alan serves as an inspiration with his first book, purposefully priced and positioned for accessibility and as a point of engagement with other business developers and firm leaders.

> "Alan serves as an inspiration with his first book, purposefully priced and positioned for accessibility and as a point of engagement with other business developers and firm leaders."

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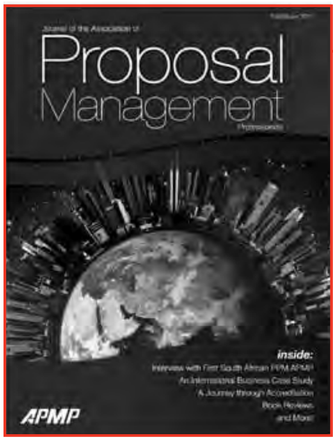

Fall/Winter 2011

Article	Sandy Pullinger	Time for a Treat
Article	Jolly, Colleen	Case Study: An American Abroad: The Story of One Small Business Expanding Internationally
Article	Moldovan, Marilyn	It's Not the Destination…!
Article	Snee, Amanda	To Be or Not To Be
Award	APMP	The APMP Fellows Award
Forum	Harris, Rick	Executive Director Forum
Review-Book	Norman, Michelle	Selling to the Government: What it Takes to Compete and Win in the World's Largest Market
Review-Book	Taurchini, Sarah	The Shredder Test: The Australian Guide to Writing Winning Proposals
Review-Book	Hiles, Jim	Business Driven PMO Setup: Practical Insights, Techniques and Case Examples for Ensuring Success
Review-Book	Hiles, Jim	The Cloud at Your Service: The When, How, and Why of Enterprise Cloud Computing
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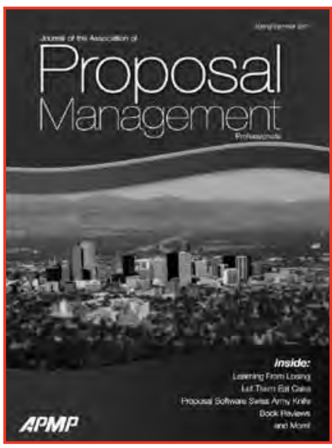

Spring/Summer 2011

Article	Frieman, Wendy	Learning from Losing
Article	Rochon, Michele	Let Them Eat Cake
Article	Wingate, Beth	Proposal Software Swiss Army Knife®
Award	APMP	The APMP Fellows Award
Forum	Harris, Rick	Executive Director Forum
Review-Book	Hiles, Jim	Advanced Facilitation Strategies: Tools and Techniques to Master Difficult Situations
Review-Book	Sokolow, Jayme	Optimisez vos Propositions Commerciales: Methods et outils du Proposal Managemenet
Review-Book	Hiles, Jim	The Strategy and Tactics of Pricing: A Guide to Growing More Profitably 5th Edition
Review-Book	Shah, Purvi	Delivering and Measuring Customer Service: This Isn't Rocket Surgery! 2nd Edition
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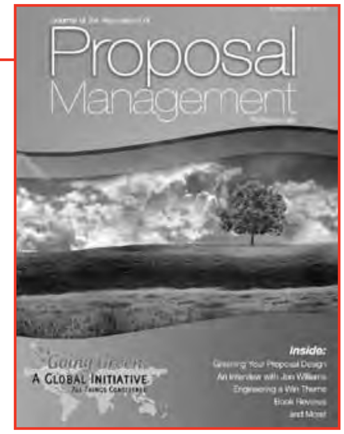
Article	Parkinson, Mike	The Science of Proposal Graphics
Article	Rudy, Todd B.	Know Thyself, Know Thy Enemy: *Applying the Principles of War to Capture Management*
Article	Hiles, Jim and Wells, Earl	Source Selection Sudoku: *How is the popular number puzzle Sudoku like the source selection factors that reviewers use to evaluate your proposals?*
Article	Randazzo, Randy & Boretz, Mitch & O'Toole, Nora & Levin, Ginger	Just Say No? Nah! Best Practices for No-Bids
Award	APMP	The APMP Fellows Award
Forum	Webb, Kriste	CEO Forum
Review-Book	Blanco, Vic	The Power of Pause: How to be more effective in a demanding, 24/7 world
Review-Book	Read, Catherine	Stein on Writing
Review-Book	Taylot, Johnnie	The One Page Proposal
Review-Book	Norman, Michelle	The Consultant's Guide to Results-Driven Business Proposals: How to Write Proposals that Forecast Impact and ROI
Sponsorship	APMP	2010 Corporate Sponsors, Members, and Alliance Partners

Spring/Summer 2010



Article	Jolly, Colleen	Green is the New Black: How "Greening" Your Proposal Design Can Save a Few Trees, Some Cash, and the World
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
Forum	Webb, Kriste	CEO Forum
Review-Book	Hiles, Jim	Beautiful Evidence
Review-Book	Hiles, Jim	Exceeding Expectations: Reflections on Leadership
Review-Book	Hiles, Jim	Executive Summary Series: Proven Six-Part Formula to Persuade Evaluators to Award the Contract to You
Review-Book	Costa, Keith	The Complete Idiot's Guide to Getting Government Contracts
Sponsorship	APMP	2010 Corporate Sponsors, Members, and Alliance Partners

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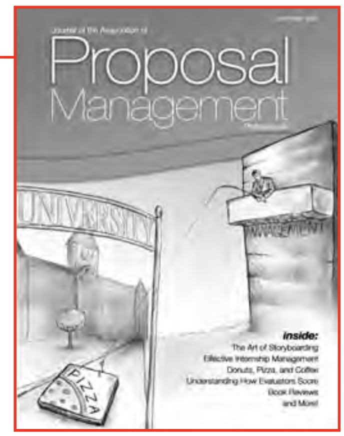

Article	Munger, Roger	Designed to Succed: Strategies for Building an Effective Proposal-Management Internship Program
Article	Keller, Chuck	From A-Z: The Very "Unofficial" APMP Glossary
Article	Herther, Jay	Understanding How Evaluators Score and How to Influence Their Votes
Award	APMP	The APMP Fellows Award
Forum	Bol, David	CEO Forum
Review-Book	Blakney, Betsy	Benchmarks in World-Class Proposal Writing Capability: How Leading Companies Produce Winning Proposals
Review-Book	McGeady, Amy	It's Not What You Sell, It's What You Stand For: Why Every Extraordinary Business is Driven by Purpose
Review-Book	Paskun, Ali	Selection Success! How Consultants, Contractors, and Other Professionals Can Increase Their Success in a Qualifications-Based Selection Process
Review-Book	Blakney, Betsy	Contracting with Uncle Sam: The Essential Guide for Federal Buyers and Sellers
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Article	Gaines, Katie	The Six Golden Rules of Proposal Writing
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Article	Divine, Charlie	Highlights of Benchmarks in World-Class Proposal Writing Capability Research Study
Award	APMP	The APMP Fellows Award
Forum	Bol, David	CEO Forum
Review-Book	Blakney, Betsy	Getting in the Winner's Circle – Creating Winning Proposals, 2nd Edition
Review-Book	Morton, Bruce	GunnSights: Taking Aim on Selling in the High-Stakes Industry of International Aerospace
Review-Book	Simmons, Chris	Winning Government Contracts
Review-Book	Hoffmann, Richard	The Back of the Napkin
Review-Book	Malkus, Susan	Charting a Path to Project Management Sophistication
Review-Book	Payne, Lisa	Proposal Development: A Handbook for Proposals Submitted to the U.S. Government
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