

Journal

SPRING + SUMMER // 2013

APMP

Your Professional Guide to Winning Business



TIPS FOR EFFECTIVE
REDACTION

GLOBAL VIRTUAL TEAM
MEMBERS' PERCEPTIONS
OF LEADER PRACTICES

MANAGING PRECIOUS
PROPOSAL TIME

IN SEARCH OF THE
COMMERCIAL PROPOSAL
PROFESSIONAL'S PROFILE

LPTA: HOW TO WIN WITH TA

HOW

WE GOT HERE

APMP MEMBERS ACROSS
THE GLOBE TELL US THEIR
CAREER STORIES

PG. 32



Need to Win More Business?

Shipleys now offers business development leadership services. *Blueprint to Winning™* offers executives and leaders the opportunity to find and fix gaps in their business development organization and process. The new *Decision Gates and Reviews* workshop teaches a disciplined approach to managing internal reviews across the business development lifecycle. Shipleys's Capture Assessment service provides an unbiased view of the state of progress toward positioning to win on key opportunities.

New Leadership Development, Training, and Assessment Services

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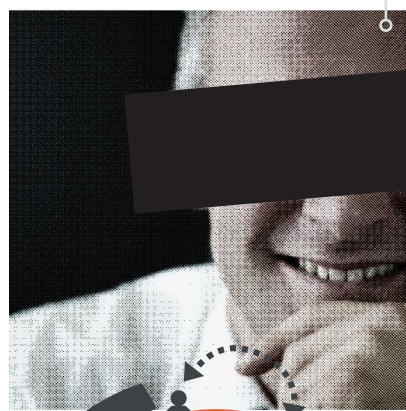


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IT'S ABOUT THE PEOPLE, PEOPLE

After managing associations the past 24 years, there is one fact I know now, more than ever. Associations are about one thing—the people in them and what they can do better by standing together.

An association is not about a product, a membership category, or a conference. A few weeks ago, we asked our APMP community to tell us in 150 words or less what you were doing before you became a proposal professional. The responses were overwhelming. We learned humorous, touching, and fascinating backstories about our APMP members. Their stories inspired us and are now the cover story of this issue.

In my 2 years with APMP, I have learned so much about our members. I know that Matt King of Shipley Associates speaks fluent French and that Nigel Dennis of Bid Write was a former Australian Rules football player. Betsy Blakney of CACI has a huge cookbook collection, and Jim Hiles of Landmark Technology recently helped plan his daughter's wedding. I know that Amy McGeady and her daughter are active in the Girl Scouts of America and that Mike Parkinson of the 24 Hours Company loves Comic-Con and goes whenever he gets the chance. Betsy Cummings of Elbit Systems plays in a band and still gets excited about every gig as if it were her first.

APMP is about people. It is about the power of making a connection, a memory, and a collection of moments that lead to something bigger than any one of us. Thank you for being the people in APMP.



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Journal

APMP

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Focus is Key

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- Effective deployment of your limited B & P budget*
- Enlist targeted, specific skills to support your current team effort*

Call us today and make winning business simple.

2013—APMP'S *YEAR OF COMMUNICATION*

Every opportunity—and obstacle—in life comes about through communication or the lack thereof. The more we commit ourselves to open communication, the more easily we can share information and collapse barriers. As APMP's 2013 CEO, I've declared 2013 the *Year of Communication* for APMP.

APMP has more than 5,000 international members, and we're committed to increasing communication and sharing best practices with you via APMP forums and one-on-one interactions.

You'll see increased quality and frequency of APMP communications via New Member Information Webinars, Quarterly Chapter Enrichment Webinars, the new Chapter Liaison Committee comprising former chapter leaders, publications, and live and broadcast events.

We're leveraging current technologies to revise our flagship *APMP Journal* and *Perspective* publications, combining the best of both into our new digital *APMP Journal*—now easily accessible to all members worldwide and poised to encourage member interaction and conversation. Introduced in mid-2012, our *APMP Reporter* continues to provide weekly association and industry news.

Bid & Proposal Con 2013 affords multiple opportunities for increased *communication*. It's the perfect place to meet new people and communicate one-on-one while you learn best practices and new skills.

Throughout 2013, our Board of Directors has a number of projects planned—all aimed at opening and continuing communications with members, chapters, and prospective members, while we provide a home for everyone involved in winning business for their organizations.

Now is the time to open yourself up to new *communications*. Get involved in your chapter, volunteer as a presenter, join a committee, join us at APMP Bid & Proposal Con, attend regional conferences and chapter events, and regularly read APMP and chapter publications. If you need help getting involved, email me at beth.wingate@APMP.org or Rick Harris, executive director, at rick.harris@APMP.org, and we'll be happy to open *communications* with you!



BETH WINGATE

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stages

- C** CAPTURE
- BD** BUSINESS DEVELOPMENT
- GP** GRAPHICS + PRODUCTION
- PM** PROPOSAL MANAGEMENT

08 //

CAPTURE

The art of early-stage identification and qualification of new business

09 //

BUSINESS DEVELOPMENT

The practice of implementing reliable planning and statistically sound data in order to deepen long-term value propositions and relationships with customers and markets

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GRAPHICS + PRODUCTION

The process of designing and combining images, words, and specific treatments to effectively convey information

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PROPOSAL MANAGEMENT

The coordination and oversight of all elements of the proposal development lifecycle from capture to win

CUSTOMER-FOCUSED

Seller Beware!

THE ART OF SELLING HAS CHANGED FOREVER

By Brad Douglas



HERE ARE A FEW TIPS FOR APMP PROPOSAL PROFESSIONALS:

Understand the capture and sales process—know what is being represented to customers.

Add value to the sales process—be proactive and stay customer focused.

Always align your message with the win strategy by focusing on benefits.

Think like a customer: How much do they know about us? Our solution? Our discriminators?



THE OLD SLOGAN, “Buyer Beware,” has almost become obsolete. Now it is the seller’s turn to “beware.” Why? What does this mean to me as a proposal professional?

Consider your most recent experience as a buyer. Maybe you purchased a vacation package. Or a kitchen remodel. Or a set of tires, or eyeglasses, or a new car insurance package. Maybe you had to choose new investment funds for your 401K, or you just wanted to buy an eBook.

Chances are you did your homework—online. You probably knew much more about the seller or the seller’s company than you would have in the “good ol’ days” ... say 5 years ago. You researched competing products, services, and brands and created your own version of “the short list.”

Our customers are no different than you and I. Whether we are selling to

the government, another business, or even our internal customers, it’s time to beware! Our customers are armed with information to help them make smart buying decisions. Our competitors are generally just as visible as we are to the customer. Consider these tidbits from the Huthwaite Center for Research:

- Buyers have access to 20 times more data than they did just 5 years ago.
- Sales people (think capture) will fail if they don’t adapt.
- Trust is still important, but it is gained differently.
- Buyers often research the actual “seller” in advance of any engagement to learn about them, their education, background, and expertise.
- A sales professional today must be a researcher and have a higher level of business acumen.

Consider the influence of social media and Web-based marketing on the selling process as reported by HubSpot in a research study on inbound marketing:

- Eighty percent of active Internet users visit social networks and blogs.
- Eighty-two percent of LinkedIn users are aware of ads on LinkedIn sites.
- Eighty-nine percent of companies are increasing their inbound marketing budgets (mostly Web and social media).
- The cost per sales lead is 61-percent lower for online and social media promotions than traditional advertising or marketing campaigns.

So, how does this affect proposal professionals?

A proposal is a sales document, no matter who the customer is. Proposals must align with the buyer's knowledge and understanding of our solution and company and with information available through electronic media. We must reflect consistency in our message, our brand, and our

value proposition to be credible to the customer—in both the way we sell and the way we write our proposals.

Excerpts from the July–August 2012 issue of the *Harvard Business Review* state:

- “The old playbook no longer works. Star sales people now seek to upend the customer's current approach to doing business.”
- “In recent decades, sales reps have become adept at discovering customers' needs and selling them ‘solutions.’ This has worked because customers didn't know how to solve their own problems. But now, owing to increasingly sophisticated procurement teams and purchasing consultants armed with troves of data, customers can readily define solutions themselves.”
- “Customers completed, on average, nearly 60 percent of a typical purchasing decision—researching solutions, ranking options, setting requirements, benchmarking pricing, and so on—before even having a conversation with the supplier.”

Account executives, sales representatives, capture managers, and others involved in positioning and selling must adapt to these new buying trends. Customers will see through the fluff, glitz, and embellishments. Our proposals must reflect our image and must align with our customers' perceptions based on publicly available information. We are all selling something—internally or to our customers. “Seller beware” is the new normal. Make sure you know what your customers know, in advance, so you can compete and win. ●

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3. Adamson, Brent; Dixon, Matthew; Toman, Nicholas. The End of Solution Sales. *Harvard Business Review*. July–August 2012, pages 3–10.

KEY TO A WIN

Reflections on Proposal Writing!

A LOOK BACK AT A GREAT WIN

By Muriel Thibaud, AM, APMP

ON A BRISK December afternoon, the marketing staff completed and sent out three significant proposals and heaved a collective sigh of relief. While waiting for UPS and FedEx to whisk the documents (and backup documents) away, several staff members succumbed to the urge to reminisce about other massive proposal efforts and the “old days,” when it was not unheard of to work 3 days straight or have dinner at the office several nights in succession. Stories were exchanged about a frantic search for a FedEx deposit box (well-hidden at the airport) on a rainy night, having equipment jam—and jam again!—

STORIES WERE EXCHANGED ABOUT A FRANTIC SEARCH FOR A FEDEX DEPOSIT BOX . . . AND THE CHALLENGE OF DEALING WITH A PROSPECT WHO YOU KNOW HAS NOT READ YOUR PROPOSAL AND WILL AWARD THE JOB TO SOMEONE ELSE ANYWAY.



and the challenge of dealing with a prospect who you know has not read your proposal and will award the job to someone else anyway.

The conversation ultimately worked its way around to the question of what constitutes a really good proposal. There was enough seniority and success represented among those gathered to guarantee an informative and expert response. Through anecdotes and admonitions, some key success factors emerged during the conversation. Chief among them were:

Know the competition. What are their weaknesses? How can you address those weaknesses without specific reference to the company?

Stay involved in the industry. Attendance at industry sessions is recommended for acquiring this knowledge. The advice was, if permitted, to send three people to such sessions—one to take notes, one to socialize, and one to listen and observe for clues to future strategy.

Identify your own company's weaknesses. Defuse them. Don't ignore them.

Determine your company's strengths. Highlight them and hammer them home.

Address the document to the specified tasks as outlined by the prospect. Their concern should be yours, too. Put efforts proportionately into the factors as they are weighted in the RFP.

Don't waste energy on bells and whistles. Often these types of flourishes—like the cover or the color of text—won't be considered.

Create an impressive beginning and a compelling ending. The first and last pages are often the ones that are remembered.



One personal story from years ago emerged, courtesy of a seasoned proposal manager, illustrating many of these points. His team had apparently been unable to secure any significant Department of Defense remediation/base closure contracts from one particular branch of the services. Despite intense efforts, the same competitive firm had locked them out again and again. Nevertheless, a proposal was prepared—one more time—in an effort to crack open the client's door. A scant 1 hour before the proposal was due to ship, a member of the proposal team dropped a casual comment to the effect that the key competitor had been unable to achieve closure on the many projects they had won to date.

The proposal manager's antenna shot up: No closures? How many? Has anyone achieved closure on these projects? The team asked themselves: Do we achieve closure

on such projects? Despite the fact that this was truly the eleventh hour, the team created a table that charted the chief competitor, other competitors, and the proposing company in a comparison of closures that revealed the proposing company had, in fact, achieved the highest rate of closure on such projects and had done so many, many times. The table was inserted into the proposal as the last page. They won that very contract—their first from this client—as well as many others since then. The client later confirmed that it had been this table that swayed the committee.

There's no doubt that proposals are a lot of routine and exhaustive work, but as this story illustrates, they can be positively exhilarating as well. ●

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Ensuring Your Proposal Themes Come Through

WRITE AND REVIEW THE WAY YOUR CUSTOMER READS AND EVALUATES

By Dan Janowski, PPM.APMP

ASSUME THAT EVERY competitor who submits a response to an RFP, whether it be a commercial or a federal one, will claim at least full compliance with all of the customer's requirements, if they are serious about winning the award. And every competitor's proposal will likely follow all the submittal instructions, address all the requirements, provide all the requested information and appendices, and offer some unique perspective on why their proposed solution is superior to all the others and why they should be chosen. Your proposal will likely not be unique in that regard. The winning proposal then, assuming it is within the very narrow price-to-win range, will be the one that can distinguish itself from all the others by correctly identifying the key customer concerns and effectively addressing those concerns through appropriate marketing positional messages. Good proposals will emphasize and reinforce these key messages throughout, in every volume, major chapter, and, ideally, every section.

The job of the pink and red team reviewers is to ensure the key messages are emphasized and reinforced. Accomplishing this can be problematic. With tight budgets, rushed deadlines, and sometimes voluminous, dry, technical writing

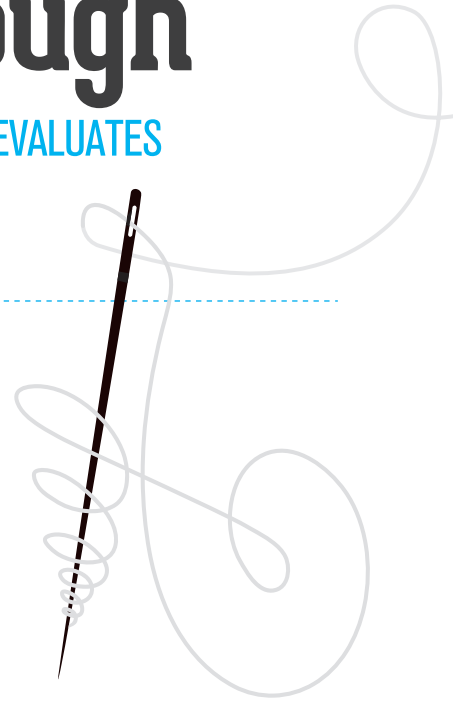
to read, it is often very easy for reviewers to become sidetracked and bogged down in the editing and miss whether or not the overall proposal holds together and the important key messages are coming through effectively—not seeing the forest because of the trees. This can be made worse on large proposals that are split into subvolumes or even chapters for different reviewers to focus on. Typically, a good reviewer can read and edit 50 pages of new text per day. For many companies, this is considered a light day's work. Color team reviewers are often challenged with examining hundreds of pages of material in a single sitting.

To ensure that all the reviewers not only have adequate time to cover their respective sections and ensure the proposal is making an effective marketing pitch from a broader perspective, it is beneficial if the proposal themes are separately reviewed to ensure continuity, consistency, and forcefulness. Although often overlooked, here is one simple way to do just that.

Every major proposal section, book, volume, or chapter should have a strong introductory paragraph, or even a single lead-in sentence—a mini-executive summary if you will—that summarizes what the reader should expect to see in

the subsequent material, and most importantly, what the vital take-away messages are for the section. Those messages must reflect and reinforce the intended overall marketing position. Some proposals use highlighted proposal theme sentences or breakout text at the beginning of each chapter or section to do this. In others, it is in the section's introductory paragraph.

Let's assume you perform a preliminary pink team review of storyboards, proposal mockups, or first drafts or perform a red team review of the final documents. Aggregate just the theme sentences or lead-in paragraphs from each section under the chapter heading, and break these out into separate documents down to the second-level chapter indent. Even in a large proposal, this distills to maybe a few pages of material. Now, provide the reviewers this summary



Team Colors



Purple Team: Assesses the probability of winning and alignment with organizational goals



Blue Team #1: Reviews initial capture strategy and capture plan



Black Hat Team: Predicts competitors' solutions



Blue Team #2: Reviews updated capture plan and solution set



Pink Team: Reviews storyboards and mockups to confirm solution set and to validate proposal strategy



Green Team: Reviews cost/price solution



Red Team: Reviews final proposal draft—including price—to predict how the customer will score the proposal



Gold Team: Approves final proposal and price



White Team: Compiles lessons learned from capture planning through proposal development to contract award

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document along with the intended positioning messages to preview before they start reviewing and editing their individual sections.

Such a breakout review can be useful in many ways. First, at a basic level, it ensures that every major section at least has a take-away message. If the section does not serve one up, you have missed an opportunity. Secondly, the breakout review will immediately and clearly demonstrate if the proposal does indeed articulate the intended marketing position and whether or not the overall proposal hangs together. The breakout review will reveal vital elements throughout—elements that can make an overall winning proposal. Thirdly, if any one section is weak, lacking, or misguided in its message, that too will stand out because of its inconsistency. Highlight the weak segment as one that might need more focus or writing improvement. If done

correctly, these messages will be logically organized in the proposal, building up in a manner that will justify and prove the ultimate marketing position. Lastly, these section reviews will imprint on the reviewers and provide them with a broader perspective on the key concept or marketing message. When the reviewers get down to the actual editing, they will be less likely to lose track of the point and rationale of the proposal.

It is strongly suggested that a breakout review be done early in the proposal development cycle—part of a pink team (or even a blue team) review—as a useful tool for ensuring that you have a strong proposal message and that in your final submittal that message is coming through effectively. As an added bonus, you will now have a method for verifying that sufficient thought has been given up front to

the proposal capture strategy, and that the message is organized and presented effectively in the proposal. As an extra bonus, if you start with a proposal outline and craft the theme sentences for each section first, you will deliver better direction to the writers by pointing out what to emphasize in their sections.

It would be a safe bet that your customer may review your proposal exactly the same way as in the summary, scanning the lead-ins to each section before they start their own detailed reviews. By making sure your sectional theme sentences are well thought out and well organized, you improve the chances that your customers will have a more favorable first impression of your submittal—a true edge over your competition. ●

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RFPs Meet Google Docs

A NO-COST PROPOSAL MANAGEMENT TOOL YOU SHOULD TRY

By Kathleen Foley



HIGHLIGHT AND PLACE YOUR COMMENT (INSERT/COMMENT) IN THE QUESTION, NOT THE PLACE WHERE YOU WANT THE ANSWER. GOOGLE DOCS WILL SOMETIMES NOT ALLOW USERS TO TYPE WHERE THE COMMENT IS LOCATED.

IN DECEMBER 2012, *The New York Times* published that over 5 million businesses were using Google Apps in 2012, up from 4 million in 2011. While application of Google Docs—the Google word processor—will not result in submission-ready proposals (we start proposals in Google Docs and later refine them in Word), the application is a very useful proposal management tool for our team, meets the majority of our needs, and adds no extra cost to the bottom line. Here's an overview of some of the benefits, challenges, and work-arounds we discovered while working in Google Docs.

USING GOOGLE DOCS FOR PROPOSAL DEVELOPMENT

The primary benefit of employing Google Docs is a simple but crucial factor in the proposal management process: collaboration in real time.

Users can work in and update a document while another user watches the writing and editing as it is happening. You can control, too, who has permission to “view” and “edit.” A chat window allows for discussions while work is in progress. This feature beats passing around a Word doc any day and alleviates version control concerns.

Next, there is the ability to “tag” users by inserting a comment and typing the “@” symbol, followed by their usernames. You can run through a document and ping all of your subject matter experts (SMEs) at once. Tagging people for input on proposal sections ensures content arrives faster. SMEs can simply add answers where they are tagged and comment back to you if they need clarification. This proved much easier than individually emailing people and then pasting their responses back into the Word document.

KNOWN CHALLENGES AND SOLUTIONS

THE ISSUE: PAGINATION

THE SOLUTION: Insert page breaks after transferring the document over to Word. Pagination does not reflect accurately in Google Docs. This is a known issue, and Google has no plans to fix it.

THE ISSUE: DESIRED FONT AND COLOR

THE SOLUTION: For custom colors and fonts, add text formatted in that color or font from a Word doc, and it will appear in the Google menu as a custom color or font.

THE ISSUE: TABLES DO NOT HOLD THEIR FORMATTING ONCE TRANSFERRED FROM GOOGLE DOCS TO WORD

THE SOLUTION: Format in Google Docs to the best of your ability because content, most notably tables,

Use a Google Docs Folder as Knowledge Base

Want an easy way to save answers from previous RFPs? Create a shared folder. Deem the shared folder as the place where everyone on your team goes for the previously agreed-upon answers and contributes new information for future proposals.

Follow these steps:

1. Create a shared folder.
2. Create subfolders so others can browse by topic (i.e., Finance, Project Management, Legal, etc.).
3. Create individual documents for answers to different questions and boilerplate sections for easy cut and paste.

When it is time for a content refresh, share the link to this folder with a note that an update is needed. For people and departments that have several documents to update or review, create a content management document in Google Docs. Use this document to schedule assignments and request updates. Include a table with columns for the section name, the Google Doc link, the party assigned, and the date content is due. Add another column for notes. Using a shared “live” document ensures everyone receives the information at the same time and when the last update occurred.

USING GOOGLE DOCS FOR PAST PERFORMANCE

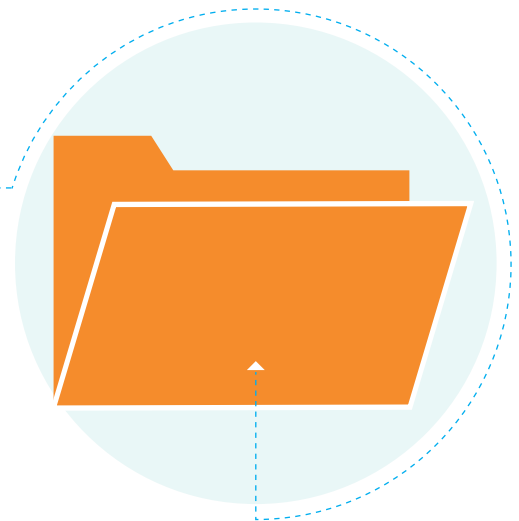
One of the biggest pain points is past performance descriptions. Project managers who leave the company for one reason or another may take pertinent project knowledge with them. Fortunately, at Appirio, we have a Customer Data Vault in Salesforce that houses customer success stories. But for those who are not working in Salesforce, Google Docs is your tool.

When projects are coming to a close, have a prepared questionnaire ready to go to your PM. A quick and painless questionnaire asks:

- What were the key objectives of the project?
- How did we meet them?
- What actions did we take to arrive at our results?
- Did we obtain and file customer quotes and pictures?

Each completed questionnaire becomes its own Google Docs-based file for future reference.

To get started at Google Docs, go to *drive.google.com* and sign into your account. If you do not have an account, take an extra minute to create one. You can either create a document right there or upload one to later work on and share. For a complete tour of this tool simply search for “Google Docs Tutorial” at *www.youtube.com*.



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are more difficult to format in Word once downloaded from Google Docs.

THE ISSUE: MERGING CELLS

THE SOLUTION: This, too, should be done later in Word. After adjusting table properties and selecting background for a cell, text shows up as highlighted in white. Go to the text highlight box and click “None.” If this doesn’t work, you can also try Format/Clear Formatting.

THE ISSUE: GRAPHICS MAY NOT IMPORT FROM WORD

THE SOLUTION: Save the graphic and then use Insert/Image to add it. Graphics may not be downloaded to Word version. Make a note in red that there is a graphic to follow, then when you are in Word, go to your Google draft and grab the image. ●

Kathleen Foley, proposal manager, Appirio, can be reached at (925) 727-4617 or + *kmfoley@gmail.com*.

Changing the Framework of the Active/Passive Voice Debate:

ACTIVE VOICE AS AN ORGANIZATIONAL DISCRIMINATOR

By Dan Fulton, AM.APMP



AS A PROPOSAL MANAGER in the management consulting industry, I am often involved in discussions with our consultants that focus on technical writing practices. While we generally tend to keep the conversations casual, I cannot help but note one subject that always seems to spark a passionate debate: active voice versus passive voice.

THE ACTIVE/PASSIVE DEBATE

Many writers like myself cringe at the overuse of passive voice in technical writing. I can trace this behavior to one of the most influential men

in my life—my 12th grade English teacher, Mr. Lavelle. You see, until I sat in Mr. Lavelle's fourth period advanced placement English class, I had always thought of myself as a good writer—maybe even a great writer—compared to my peers. So I am certain you can understand my surprise when Mr. Lavelle returned my first paper submission with the following note on the front page, written in the most pronounced shade of red ink I had ever seen: "NO NO NO NO NO—NO FORMS OF TO BE: BE, AM, IS, ARE, WAS, WERE, BEEN, BEING!!!" This was the exact

moment that I learned to embrace active voice.

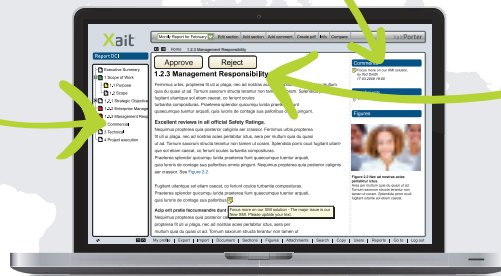
I tell the story of my first experience with active/passive voice not just out of nostalgia but also to illustrate the fact that writers do not inherently use active voice. I try to keep this fact in mind while engaged in the active/passive voice debate.

Of course, I, too, understand that certain situations require passive voice and fully subscribe to the APMP's guidance to "Use active sentences unless you have a good reason to choose passive."¹ In the management consulting

industry, particularly with public sector clients, some firms go so far as to purposely use passive voice in client deliverables and proposals as a tactic to shift responsibility away from the firm.

While this is obviously an extreme example, it does provide some context to negative viewpoints of passive voice in general. Think of it in this context: In interviews and exchanges with media leading up to his championship fight with Sonny Liston in 1964, Cassius Clay (Muhammad Ali) presented what is perhaps his most recognizable line, "... float like a butterfly, sting like a bee,

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his hands can't hit what his eyes can't see." If Clay had used passive voice in his delivery, it may have sounded similar to, "Like a butterfly is how I will float. Like a bee is how I will sting ..." The passive voice version loses impact, increases ambiguity, and is awkward to say aloud—certainly not the intent of the message Clay delivered.

To continue the boxing analogy, when we use passive voice in proposals and client deliverables, we, in effect, *pull punches* from the evaluator. While I am certainly not suggesting interaction with evaluators should equate to a fight, assertiveness and confidence in writing is an important piece of the competitive advantage. After all, in life, the boss oftentimes rewards that assertive, confident colleague with the promotion or bonus you had your eye on. Why should we expect a different behavior from our clients?

I am a champion of active voice usage at my firm and occasionally face resistance within the organization. Because I cannot take a red pen and write "NO NO NO NO NO" on our deliverables and proposals, I try my best to gain active voice converts through the debates. I have recently found success by simply changing the way our organization views the active/passive voice debate.

THE CALL FOR CHANGE

In previous active/passive voice debates, I have cited college professors, textbooks, writing websites, and the *Shipley Proposal Guide*. Of course, thanks to the always accessible Internet, we can easily locate countless examples of winning proposals, important reports, and other documents written by notable writers who use passive voice, and these examples consistently serve as significant ammunition within the debates. After several of these debates, I knew that I needed a new strategy to increase our use of active voice. I realized that the employees at my firm—as is true for

THE PASSIVE VOICE VERSION LOSES IMPACT, INCREASES AMBIGUITY, AND IS AWKWARD TO SAY ALOUD.

most firms—care more about growing the company than about writing styles. When the firm wins business, everyone wins. With this realization, I quickly saw the opportunity to frame the active/passive voice debate around an idea in which all parties, regardless of position on the active/passive voice continuum, could agree. The debate then took on a new look and feel. Rather than using grammar guides and boring professors, I framed the debate as follows:

Think of active voice as a discriminator.

Explain to writers that a statement such as, "Our firm recommends x," promotes a different and stronger stance than "It is recommended that x ..." Many consulting firms use passive voice as a risk-avoidance tactic. Because we promote ourselves as a trusted advisor to our clients, we should write in a way that is confident and highlights our expertise.

Use active voice in both client deliverables and proposals.

Communicate to consultants that by predominantly using active voice in proposals to clients, you provide tangible examples and data. By continuing this practice, the organization gains a reputation as the firm that provides confident and genuine recommen-

dations to clients. The more this occurs, the more likely you are to win contracts.

Celebrate wins that use the active voice discriminator.

With each win that promotes the active voice discriminator, highlight the individuals who used active voice in their writing and celebrate their contributions to the proposal effort. You may even opt to refer to them as members of the business development team. For some writers, the celebration may serve as their own moment to embrace active voice.

If your firm is one to engage in the active/passive voice debate, this framework can support your efforts to gain adoption of active voice across the organization. It may also offer additional benefits, such as all parties of the firm developing a deeper support and interest in the business development process. The organization can increase unity between business development and service teams through the common goal of winning business.

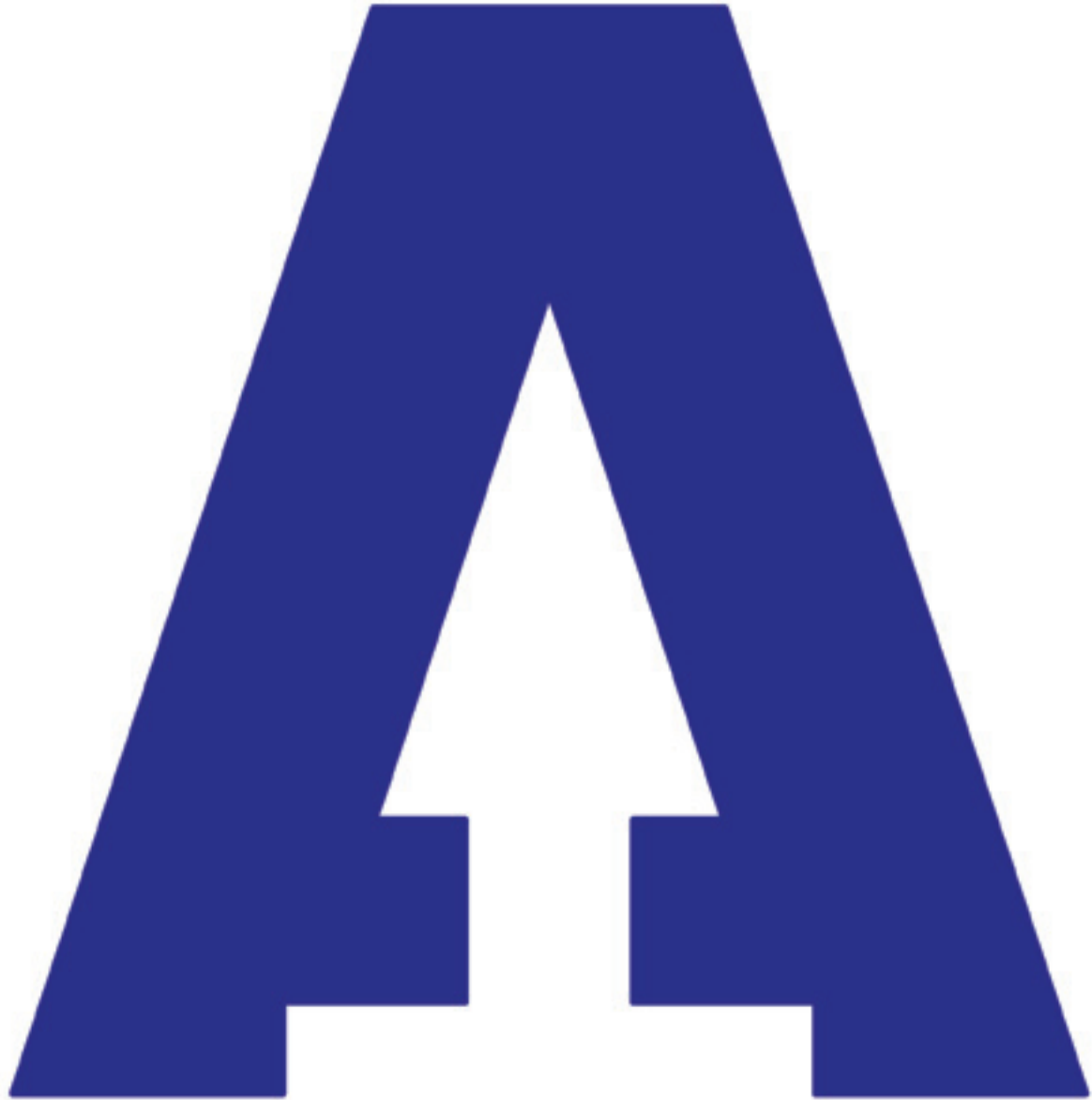
Given today's competitive landscape, organizations must find new ways to develop discriminators. Clients in all industries demand trust, confidence, and quality from their vendors. Changing the framework of the active/passive voice debate to support these desired traits offers a simple, inexpensive path to promote your organization to your customers. ●

Dan Fulton, AM.APMP, is manager of marketing, research, and bid development for Momentum, Inc., located in Camp Hill, Pa. For more information, please visit + www.m-inc.com or email Fulton at + dfulton@m-inc.com.

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Stop Wasting Precious Proposal Time!

By Chris Simmons



“TIME” HAS BEEN one of the most talked about topics since the ancient Egyptians established the 24-hour day over 3,000 years ago. Even today, time continues to be a popular and increasingly diverse topic. My recent Google search yielded 35 million “time management” hits, ranging from time-and-motion studies to self-help. It is no coincidence that, when asked about the most significant challenges proposal professionals face, the responses most often mentioned are related to time: “Not enough time to respond,” “no respect for proposal schedule deadlines,” “limited resources that increase time pressures.” The list goes on and on.

It’s a fact that, before most proposal efforts start, precious days (sometimes weeks) are wasted. Companies either struggle to get a bid/no-bid decision, have difficulty securing the appropriate resources, or both. To make matters worse, proposal schedules are getting shorter—most are 10 to 30 days. With so much time wasted and such little time to respond, the challenge of creating a compliant, compelling proposal becomes a daunting task seemingly doomed for failure even before it begins. Proposal team members have to sacrifice their nights, weekends, and even their health just

to get a competitive product out the door on time. What’s a proposal professional to do?

Unfortunately, there isn’t enough time to describe all the ways you can better manage your proposal time—we all have time management challenges! But here are five high-impact recommendations and related tips that will help you get more out of your next proposal effort in less time.

1. **Set ground rules and plan.** Thorough planning is one of the cornerstones of managing time efficiently and effectively. Most teams rush to kick off the proposal before they have a plan. Experts agree that up to 15 percent of the total proposal development schedule should be allocated to carefully planning the kick-off meeting—that means 4 to 5 days after RFP receipt for a 30-day response schedule.

TIPS:

- Structure a kick-off meeting around capture and proposal plans.
- Discuss proposal roles and responsibilities, the outline, evaluation criteria, solution features/benefits/proof, proposal themes, proposal schedule, assignments, proposal



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infrastructure and logistics, and RFP questions/issues/assumptions/risks.

- Take the time to develop kick-off meeting handouts, including storyboard and proposal mock-up templates, writing guidelines/tips, a detailed outline, a daily proposal schedule, a style guide, color team review processes, and an executive summary draft.

2. Organize the work into small, manageable steps.

One big time waster is letting proposal teams go off for days at a time to write. This is especially inefficient if analysis of the RFP has not been discussed, a compliant outline has not been developed, or compelling solution features and proof points that address customer evaluation criteria and hot buttons have not been identified.

TIPS:

- The proposal schedule should include a number of detailed steps to keep everyone on track and on time.
- Specific proposal milestones should include RFP review meetings, RFP Q&A meetings, outline reviews, solution development meetings, storyboard/module plan reviews, story map reviews, interim peer/proposal management reviews, and color reviews.

-
- ## 3. Conduct regular status meetings.
- Let's face it: Some of us are still kids in adult bodies, and proposal managers often have to babysit their team members. Like most kids, proposal team members will test the limits of authority to see how much they can get away with. It's the proposal manager's job to make sure individual team members

achieve milestone deadlines. It's the proposal team members' responsibility to let the proposal manager know if they can't make the deadline and why.

TIPS:

- Meetings should focus on the status and issues/risk summary of each proposal section/subsection.
- Use a simple, color-coded status (scorecard) to indicate how each section is tracking according to plan.
- Include a review of action items with specific owners and dates.
- Start on time, every time, at the right time. Try a starting time like 3:05 p.m. to avoid rush hour traffic, to get caught up after a late lunch, or to transition from a meeting that ends at 3:00 p.m.

-
- ## 4. Keep interactions short and to the point.
- Most people dread the idea of going to meetings. It's not surprising. Most meetings are either poorly managed, take too much time, or are altogether unnecessary.

TIPS:

- If a formal meeting is in order, identify the target audience in advance and check attendee schedules before sending a meeting invite.
- Include an agenda with specific time allocations for each topic, based on current priorities.
- Manage the meeting according to the agenda and schedule with enough time to review action items, owners, and due dates.
- Finish the meeting early.

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- ## 5. Make it better for the next time.
- Even the most prepared and organized teams with highly qualified staff fail to win new business. Why? There are too many

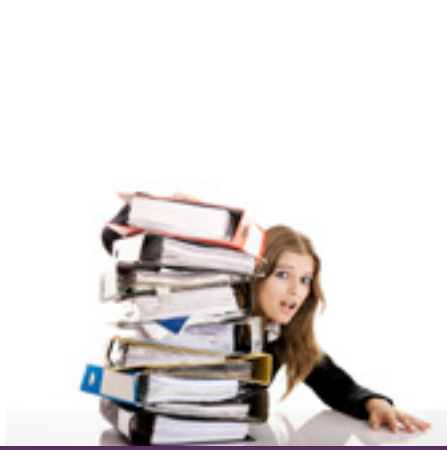
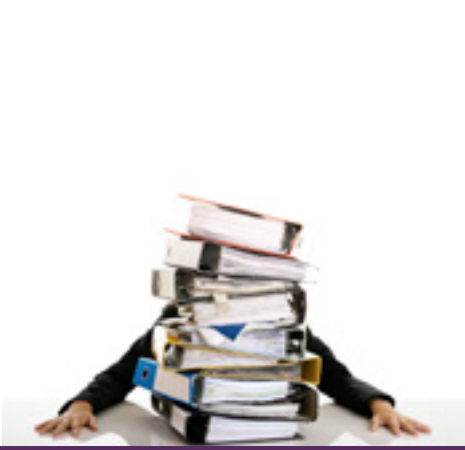
variables to be able to guarantee success. This is true even in cases where the proposal team remains constant. Despite what might seem like the same old people doing the same old thing every time, each proposal effort has important and valuable lessons that can be applied to the next proposal. A rewarding proposal experience is all about efficiency (getting it in) and effectiveness (getting the win). It's up to you to do your part to achieve these goals.

TIPS:

- Make the "lessons learned" activity a standard process.
- Take the time to document lessons learned throughout the proposal effort.
- Look for opportunities to solicit written feedback to determine what can be done better (or differently) and who should (or shouldn't) be considered for the same assignments in the future.
- Summarize your thoughts in action-oriented recommendations. Suggest a time to discuss them with the appropriate decision maker(s).

Take action today. Stop wasting precious time, and start managing your time better. Write down the two to three recommendations or tips that resonate with you the most. Think about how to incorporate these into your everyday routine. Start now or you may not have time to do it later. When faced with his own mortality after a pancreatic cancer diagnosis, Randy Pausch may have said it best in *The Last Lecture*: "Time is all you have. And you may find one day that you have less than you think." ●

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Managing Rapid Response Proposals

By Mitch Reed, PPM.APMP

THE GOVERNMENT IS JOINING the commercial world through the use of Indefinite Delivery Indefinite Quantity (IDIQ) contracts to more quickly obtain goods and services. This has resulted in the turnaround times for request for proposals (RFPs) to be shortened. The continuing customer trend presents a significant organizational challenge to plan, coordinate, and execute these requests in a compressed time frame. In addition to reduced response time frames, customers are demanding smaller, more concise proposals with minimum page counts. As most experienced proposal managers have learned, rapid response proposals (RRPs) are time consuming and very difficult to develop because no words can be wasted.

Responding to page-limited, short-turn proposals require proposal professionals to shift closely held personal philosophies about “how things get done” to a focus on “execution excellence” and “work product development.” This philosophical shift means the proposal manager takes on a much greater level of responsibility to perform the initial planning effort as well as produce several of the work products needed to conduct an effective kickoff all within a shorter time frame.

DEVELOP AN RRP APPROACH

An effective RRP approach is built around the following key capability and competency areas:

- **RRP management plan:** A clearly defined, time-phased approach that proposal managers apply on Day 1 that details how the team will work together to get the job done.
- **Standardized forms:** A consistent set of documents or work products that present information required to support the proposal development effort.
- **Roles and responsibilities:** Define who is responsible for performing tasks and when.
- **Trained proposal and support personnel:** Experienced personnel (proposal managers, writers, subject matter experts, pricing analysts, production, graphics, etc.) trained to perform and execute the RRP management plan.
- **Content database:** Establish vetted proposal response materials organized to allow for use as baseline content.

The key goal of the RRP management plan is to eliminate any and all unnecessary tasks while accelerating the use of best practice and project management techniques to plan and execute the RRP development effort. The single most significant barrier to an effective RRP approach is often your “corporate culture,” including your legal/contracts review, extra review cycles, and signature approval scheduling policies.

While these types of policies may be completely necessary under

normal operating scenarios, they often contribute to an almost impossible work schedule in which to develop an RRP response.

RRP MANAGEMENT PLAN

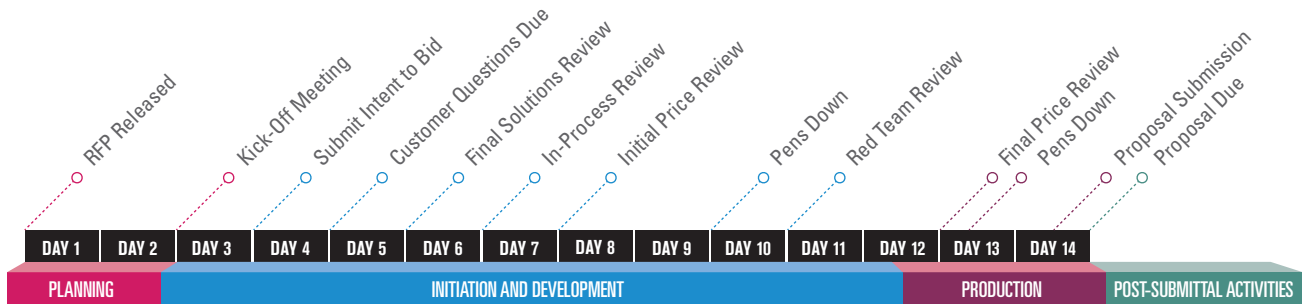
The RRP management plan clearly defines:

- Each task to be performed and resulting work products due by proposal development phase
- When and in what order (time phase) each task is to be performed
- Task owners responsible for performing developing work products
- Work product definition.

The RRP management plan must be repeatable and capable of supporting most types of RFPs and, therefore, must be developed in advance of receiving an RFP-type proposal. The RRP management plan addresses the four key proposal development phases presented in Figure 1: planning, initiation and development, production, and post-submittal activities. Each phase has specific tasks and work products that enable the proposal team to execute the proposal development effort.

Standardized forms and documents presented in Table 2 represent proven industry best practices that, when properly used, improve the proposal team’s productivity and support proposal compliance. The

Figure 1: Sample Rapid Response Activities and Work Products Time Line



Planning Work Products

1. Project Notification
2. RFP Analysis
3. Schedule
4. Compliance Matrix
5. Proposal Outline
6. Proposal Style Guide
7. Kick-Off Package
8. Production Checklist
9. Initial Proposed Solution

Proposal Development Work Products

1. Initial/Final Proposal Content Sections
2. Final Proposed Solution
3. Issues Tracking Log

PRE-PRODUCTION ACTIVITIES

Pre-Production Work Products

1. Production Materials (Paper, Binders, Shipping Materials, etc.)
2. Proposal Cover
3. Front Matter
4. Cover Letter
5. Tabs

Post-Submission Work Products

1. Archive Documents
2. Lessons Learned
3. Content Management
4. Customer Clarification Questions
5. Request Customer Debrief

Proposal Production Work Products

1. Final Proposal Document
2. Submission Receipt

A comprehensive planning effort followed by an effective kickoff is the primary determinate of the effectiveness of any RRP project.

Table 1. Proposal Development Phases: Tasks performed in each proposal phase directly support the team’s ability to effectively execute assigned tasks in follow-on phases. This table lists the recommended minimum tasks to be completed for an RRP effort by phase.

The proposal planning phase is the most important and should be completed within 24 to 48 hours of the RFP release. An omission in the proposal planning phase will adversely impact the entire proposal effort.

RRP Phase	Description
PLANNING	<ol style="list-style-type: none"> 1. Develop and send Proposal Project Start Notification with core project planning data 2. Conduct RRP analysis 3. Develop a proposal project schedule 4. Create a compliance matrix 5. Develop the proposal outline 6. Identify and form the IPT 7. Develop a production checklist 8. Create or update a proposal style sheet 9. Prepare the kick-off package 10. Manage questions to the customer
INITIATION AND DEVELOPMENT	<ol style="list-style-type: none"> 1. Facilitate proposal kick-off meeting 2. Manage daily proposal development effort <ol style="list-style-type: none"> a. Daily standup/status wrap-up meetings b. Perform issues tracking and resolution 3. Facilitate team meetings/review teams c. Manage document and information exchange d. Schedule, plan, and facilitate key meetings and reviews
PRODUCTION	<ol style="list-style-type: none"> 1. Order shipping and production materials 2. Format/edit final proposal response 3. Compile, review, and produce final proposal response and package 4. Confirming proposal has necessary approval/signatures 5. Submit proposal response package to customer
POST-SUBMITTAL ACTIVITIES	<ol style="list-style-type: none"> 1. Archive developed materials into content management system 2. Conduct lessons learned 3. Perform content management review and update 4. Manage customer clarification questions 5. Request customer debrief

Table 2. Proposal Forms and Documents

Forms/Documents	Description
PROJECT NOTIFICATION	Rapidly communicates the start of a new proposal project and communicates important information to key managers and personnel at the same time
SCHEDULE	Contains key milestones, key activities, time frames, and due dates
COMPLIANCE MATRIX	RRP requirements and instruction breakout
ANNOTATED OUTLINE	Based on customer instructions, provides the writers a defined response
PROPOSAL STYLE GUIDE	Provides writers basic writing guidance
PRINTING AND DELIVERY CHECKLIST	List of proposal deliverables, production tasks, packaging, and delivery instructions
INITIAL/FINAL SOLUTION	Written operational or technical solution
KICK-OFF PACKAGE	Key proposal project information
REVIEW TEAM REPORTS	Recommendations, concerns, changes, etc., the proposal team must address in the RRP response
LESSONS LEARNED REPORT	List of issues and action items to improve future RRP efforts

A defined approach with standardized forms reduces the time required by the proposal manager to develop each work product.

goal of standardized forms and documents is to provide a consistent presentation of critical information required by the proposal team while allowing for each proposal's unique differences.

A WELL-PREPARED TEAM CAN WIN AT RRP'S

Taxing the team with training during a time-constrained RRP effort is not advisable. Perform all proposal development and process training in advance. The proposal staff must understand core RRP best practices, when to apply them for the greatest effect, and the ultimate benefit they offer.

By developing in advance an RRP development methodology combined with sound project and proposal management techniques, significant productivity gains are possible, allowing proposal teams to reduce development time while maintaining proposal product quality. ●

Mitch Reed, PPM.APMP, is principal director of business operations at WBDS, Inc., author of *Developing Successful Internet Request for Proposals*, and an APMP conference speaker. He can be reached at + www.winningbds.com.

Roles and Responsibilities in an RRP Environment

In an RRP environment, an Integrated Proposal Team (IPT) usually produces a successful proposal, with each member having responsibility for a specific portion of the final product. Under a time crunch, the proposal manager is responsible for focusing the team and creating effective communication channels. The proposal manager not only manages the coordination of team efforts, but manages cooperation between all team members. The rest of the IPT consists of the following core members: ●

- Capture Manager/Sales Lead
- Program/Project Manager
- Technical Architect/Concept Operations Lead
- Technical Writers/Subject Matter Experts
- Contracts Lead
- Pricing Lead
- Graphic Artist/Desktop Publishers



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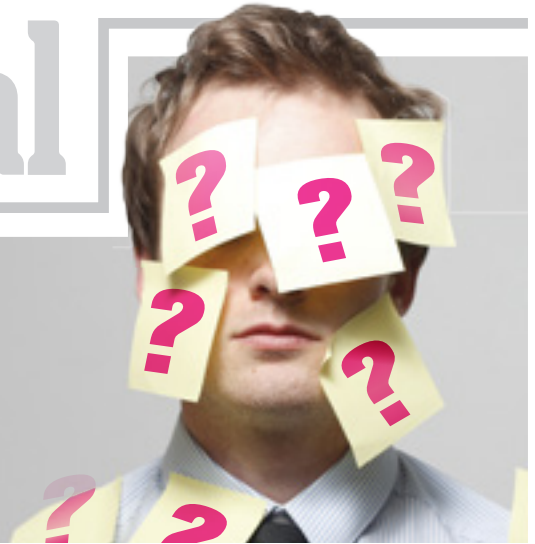
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Commercial



In Search of the Commercial Proposal Professional's Profile

By Jody Alves

In conjunction with its New York Metro Chapter, APMP held a pilot program for commercial proposal professionals on February 19, 2013, at the offices of Ernst & Young in New York City. Dubbed "Proposal Project: Commercial Pilot," the event germinated from an idea I had after the commercial "live" seminar at the 2012 Bid & Proposal Con in Dallas, Texas.

The idea was to hold a small gathering of commercial professionals to discuss their roles, their proposal products, their processes, and their *best* practices. We held the first pilot session in New York City, and I moderated it along with Melissa DeMaio, associate director, communications and pursuits strategic manager of Ernst & Young, APMP board member and co-chair of the New York Metro Chapter, and APMP's executive director Rick Harris.

While some may think APMP's Commercial Community is a relatively new initiative, the effort to attract and support the commercial arm of the proposal profession has been ongoing since APMP's earliest years. This New York pilot program attracted 27 professionals from across the proposal industry spectrum, including accounting

(Ernst & Young), finance (Plante Moran), gaming (GTECH), insurance (Guardian), corporate identity (Michael C. Fina), telecommunications (Verizon), utility (Con Edison), computer and office equipment (Canon, IBM), legal, travel (FCm), consulting engineering (Hatch Mott MacDonald), health care (CatamaranRx), proposal (APMP, Strategic Proposals), and other industries (Urban Development Solutions).

So, what happens when 27 proposal professionals from the "commercial" side get together? We learn a lot about our profession. Among other things, the pilot focus group determined:

- How these professionals arrived at the proposal profession
- What kinds of proposals they produce

- How they handle their volume and proposal turnaround times
- How large or small their departments are
- What challenges they face
- How they find good talent
- What best practices they use

Some preliminary commercial proposal findings showed:

- 72 percent provide customized (versus boilerplate) responses.
- 73 percent receive customer feedback casually or through a formal debrief; 89 percent of internal feedback comes through those methods.
- 16 percent are involved in the capture process, while 53 percent receive the fruits of the capture/business development process.
- The challenges most faced by attendees include lack of appreciation of the sales opportunity, updated content talent (recruiting), time to dedicate to

pursuit, volume, feedback, consistent executive-level support, pricing, understanding of the value they add, lack of respect for their timelines/milestones, and timely attention from subject matter experts (SMEs).

- Ideas for resourcing include involvement with local universities to promote the profession, a recruiting writing test, an onboarding process, APMP teaching opportunities, and internal training/mentoring.
- Attendees identified 43 individual best practices, including biography management, field visits, helping the client develop the RFP, locked writer templates, opportunity summaries, SME awards/recognition, competitive intelligence, executive summary questionnaire, quality management process, asking leading

questions, analytics/benchmarks, automation, file management, intake forms, weekly sales calls, and more.

The ultimate goals of this Commercial Pilot focus group are far-reaching and include:

- Encouraging small gatherings of APMP Commercial Community members to meet regularly to discuss the same kinds of things discussed in the pilot.
- Capturing and analyzing the data in relation to the pilot data.
- Engaging the entire Commercial Community membership in the data collection effort through surveys.
- Creating training programs and documentation specifically for the Commercial Community.
- Creating a brand or identity for the group with which all of its diverse members can identify.

APMP is capitalizing on the pilot program's energy and knowledge by surveying our entire Commercial Community membership with the same questions raised in the pilot. We received a 20-percent response rate, and 697 Commercial Community professionals shared their ideas with APMP!

If you participated in the APMP Commercial Pilot Program, you will receive an executive summary of the larger survey. If you want to be a part of the vibrant and growing APMP Commercial Community, please reach out to Lauren Williams, APMP Member Coordinator and Chapter Liaison, at lauren.williams@apmp.org or call her at 443-691-8810. ●

Jody Alves is manager of proposal writers at GTECH Corporation, Providence, R.I., and she can be reached at + jody.alves@gtech.com.

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LPTA: How to Win with TA

By Mike Parkinson, PPF.APMP

Lowest Price Technically Acceptable (LPTA) is a criterion used to select a solution provider from a list of competitors in a federally governed proposal competition.

Competitors that are graded “technically acceptable” (i.e., their proposals meet the capability requirements defined in the Request for Proposals [RFP]) make it to the final round. Among these finalists, price alone dictates which proposal wins. Using LPTA as the criterion for a proposal proclaims the RFP issuer sees no benefit from an offeror exceeding the requirements stated in the RFP.

Excluding simple deliverables, LPTA is not a wise strategy to use in selecting most proposals. Devaluing quality and experience raises risk levels. Unfortunately, our country’s current fiscal situation is contributing to the increasing number of RFPs reliant on LPTA to determine the winner. Working within the limitations of LPTA is the only option if we want to bid on the growing number of LPTA RFPs.

So, what can we do to increase our chances of winning LPTA RFPs? Of course, pricing is key. You will need a “price-to-win” strategy executed by an experienced professional who understands the client. The pricing specialist will build a price that can win based on current costs, past experience, the customer’s proposal award history, and other variables. But price-to-win is not the only strategy to win an LPTA proposal because there is no other interpretation of “lowest price.” Meaning, if a “technically acceptable” proposal from your competition is \$1 less than your price, then their proposal *must* win. Additionally, if a proposal is priced too low, there is an increased risk of being found *not* technically acceptable or the offeror may lose money on the contract. For this reason,

price is not my only focus—and it shouldn’t be yours either.

LPTA was not intended for bids needing complex solutions, yet some LPTA bids are far from simple. For a complex bid, it is impossible for the RFP to define every element that makes a solution “technically acceptable.” There is room for interpretation. By focusing on the parameters of the “technically acceptable” (TA) portion of LPTA, we increase our chances of success.

Human evaluators are not robots. Quality will *always* be considered, even in an LPTA environment. In an LPTA proposal, credibility becomes the qualitative and quantitative differentiator. Your goal should be to win with proof points within the constructs of the LPTA evaluation system by answering the question: Why choose us and not our competition?

The secret to winning with TA is proof—proof that you can deliver at the price quoted and that a



Graphics will show that you've proven your firm can deliver a higher quality solution at a low price—when others cannot.

lower-priced solution introduces too much risk and, therefore, is not TA. Use this strategy to rise above competitors and prove your proposal is technically acceptable at the price listed.

When proving your solution is the right choice at the right price, I recommend the following two steps:

1. Prove that you will deliver the solution on the timeline at the price quoted.
2. Prove that a lower priced solution is too risky. (However, do not use this step if your proposal will not be compared with other proposals. This step is best for proposals that conduct price comparisons.)

PROVE YOU WILL DELIVER AT THE PRICE QUOTED

Use these three methods to prove that you will deliver the product or service on schedule and on budget: comparison, past performance, and quantitative.

THE COMPARISON METHOD

Through direct comparison, show you will execute your solution at the quoted price. For example, in a traditional staffing scenario, there may be eight steps. By comparison, your staffing approach might have four and delivers the staff required in the RFP. Prove how you cut four steps to

lower the price without impacting the outcome.

THE PAST PERFORMANCE METHOD

Technically, past performance is not needed in an LPTA bid because the Federal Acquisition Regulation states that “unknown” past performance shall be considered “acceptable.” However, use past performance to illustrate proof of concept. If you say you can meet requirements of the deliverable at a lower price point, prove this assertion or risk being found *not* TA.

THE QUANTITATIVE METHOD

Show data gathered during testing or past reviews to validate your solution. Numbers have teeth when establishing credibility because that which is measured typically improves and is repeatable. Qualify your data with research notations when applicable.

PROVE THAT A LOWER-PRICED SOLUTION IS TOO RISKY

Low price is often associated with high risk, because low price is synonymous with lower quality, increased likelihood of failure, lost efficiency, and a spectrum of negative outcomes. Highlight these risks, and then point out critical elements found in your solution that mitigate these risks. If these features are missing or

executed poorly, the proposal should be deemed *not* TA. (Think of these elements as critical success factors.)

Buyers are risk averse. They do not want to buy a low-priced solution that doesn't work. Throughout your proposal, remind evaluators of the dangers associated with a bad buying decision. Empower them to eliminate questionable solution providers—your competitors—by highlighting elements required to render the best service at a low price. For example, in the graphic above, the checkmark symbol is defined as “Required to be TA.” Point to the features needed to ensure a successful execution at that price. Without these highlighted features, the risk of failure increases. This approach is subtle; you can be more implicit when acceptable.

The two steps and the methods come together in the above graphic. Use graphics to make it easy for evaluators to find, understand, remember, and grade information that is crucial to your proposal's success.

An LPTA RFP is an opportunity to win on TA as long as you follow this strategy. Prove that you deliver a higher quality solution at a low price—when others cannot. ●

Mike Parkinson, PPF.APMP, is a partner at 24 Hour Company (+ www.24hrco.com) specializing in bid-winning proposal graphics. He can be reached at (703) 533-7209 or + mike@24hrco.com.



HOW WE GOT HERE

MEMBERS OF APMP DISCUSS THEIR JOURNEYS IN PROPOSAL MANAGEMENT

IT'S A QUESTION WE'VE ALL BEEN ASKED:

How did you become what you are today? This question provokes reflection and, oftentimes, astonishment. We may feel a sense of pride that, somewhere along the way, our cleverness or instinct landed us exactly where we were meant to be: Here.

We asked our members for a few stories of their own. Here's what we got:

JENNIFER HARRISON • APMP UK

Postroom Assistant! I started my working life at Alfred McAlpine Civils (acquired by Carillion) 13 years ago. I was working in their postroom when a position came up in the proposals department. I didn't know much about proposals at the time, but I was surprised—and somewhat pleased—to see that it brought my love of graphics and the written word into one role. I applied, went through two interviews, and got the job.

SCOTT KNITTER, AM.APMP • GREATER MIDWEST CHAPTER

I always assumed I'd be a public school teacher, and into the public schools I went. One short year: taking over for a burned-out band director (I should have seen the red flags there!). Another short year: taking over for a high school German teacher going on maternity leave. As I reeled from the new insight that I was a fish out of water in the realm of school teaching, Electronic Data Systems blasted into the Detroit area and scooped up thousands of warm bodies, put us in navy blue suits, and gave us new corporate lives. I learned proposals from a hardcore, seasoned manager and superb editor. From red pens and manila folders to SharePoint libraries and APMP certification, the rest is history. I'm glad about it all.

D.L. QUESINBERRY • NATIONAL CAPITAL AREA CHAPTER

Awarded finishing school, age 14. Graduated, age 16. Married, age 17. Intended to be a career wife, mother, and author. Divorced. Attended Clark College of Court

“The more I gave, the more it gave back.”

—R. Dennis Green, National Capital Area Chapter, talking about his proposal profession

Reporting before returning to D.C. Raised my five U.S. Marine Corps-bred babies. Served as government court reporter. Applied to Congress, where Chairman Rostenkowski hired me to work with his attorney, a lobbyist. Wrote for the President of the United States as a junior lobbyist. Later began DonnaInk, where I developed over 25,000 documents in 100+ subject areas for 200+ national and international clients. Now have two business arms: ZenCon (business solutions) and DonnaInk Publications (publishing house for more than 40 authors and 100 titles).

TIM PEPPER • TIDEWATER CHAPTER

I was a young, former U.S. Navy sonar technician working as a field service technician for a medium-sized defense contractor. The local director firmly believed that everyone should learn to work on proposals. I was assigned to work past performance for one proposal, résumés for another, and technical approach for yet another. Someone noticed my ability to distill the essence of a topic into meaningful proposal content, and I became one of the people frequently tasked to support bids around the company. I took an opportunity to move into a full-time proposal position in 2005. The rewarding work occurs within a structured framework with fresh topics encountered in varied environments for Navy and Air Force customers.

BARBARA ESMEDINA • NATIONAL CAPITAL AREA CHAPTER

In 1978, I got a shipyard job on a dare. During a hiring shortage, I was hired sight unseen by referral. They were pretty upset when I showed up (no women allowed). They tried everything to get me to quit. As the oldest child with four brothers and a tough Marine colonel dad, I am not easily intimidated. The company was an out-of-town subcontractor having serious problems with the prime QA [Quality Assurance Program Manager]. The QA was a bully that terrified everyone. The next time we were in trouble, they sent me, hoping I would quit. The QA sent me back with an order that he would

accept paperwork only from me or they were to shut down. I discovered my talent for writing creative excuses about why we messed up and how it would never happen again. I went on to writing TOs and RFPs. I am still friends with that bully today.

LEE HENDRICKSON, PPF.APMP • PACIFIC NORTHWEST CHAPTER

After graduating from college in 1967, I worked as a hardware and software engineer for a radar company. Later, another company discovered I could write well, so I became the go-to guy for tech writing. I wanted to get back into engineering, and as fate would have it, I stopped for breakfast on the way to another interview and noticed Computer Sciences Corporation (CSC) across the street. I thought, “Why not?” and walked across the street to drop off a résumé. That afternoon, I was asked to interview at CSC for a job assisting a proposal guru. I was hooked. Later, I worked as a proposal specialist at Aerojet and learned a great deal from Jack Dean, one of the earliest CEOs of APMP. That experience changed the course of my career for good.

LARRY NEWMAN, PPF.APMP • MOUNTAIN WEST CHAPTER

As an engineer that had just declined a geographic move to a field sales position, I responded to a Shipley Associates’ special projects ad. Upon completion, Boeing requested a deputy proposal manager to help prepare the first foreign military sale proposal to China—avionics for the F-7. I was sent to Days 2 and 3 of Dr. David Pugh’s “Writing Winning Proposals” workshop in St. Louis, and then I was introduced to the Boeing team in Wichita, Kan., by Dr. Terry Bacon and assisted Ted Petty for 9 weeks. (A veteran Shipley trainer warned me that for excitement in Wichita, they sat deck chairs beside the highway and watched the paint stripes fade.) The training was effective, Ted Petty was a great proposal manager to assist, and I enjoyed the challenge. My next reward was being sold as a “solid rocket motor manufacturing expert.” Never a dull moment.

GEORGE BROWN • FLORIDA SUNSHINE CHAPTER

I was a programmer for UNISYS (then UNIVAC), supporting NASA way back (not telling) when. I moved from there into software management, then program management. I learned total program life cycle. I was called on frequently to support proposals. I liked it, and the company thought I was good at it. I took on fancy titles and did marketing and proposals for several successful companies—putting them on the map, so to speak. The rest is history: onto proposal management and eventually proposal consulting. My latest venture is a 100+ PowerPoint slide show teaching U.S. government proposal writing.



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R. DENNIS GREEN • NATIONAL CAPITAL AREA CHAPTER

One day: *TourBook* managing editor and travel writer for AAA.

Very next day: Trial-by-fire introduction to a short-fuse government proposal's end game, churning late into the night at Computer Sciences Corporation. It was hard. We won. I was hooked.

Now: The profession has been enormously rewarding for 35 years and counting. Endlessly varied. Always new things to learn. The more I gave, the more *it* gave back.

MARGARET MCGUIRE, APM.APMP • NY METRO CHAPTER

I used to lead a team of technical writers who developed help desk articles for common desktop applications. When that company exited the knowledge base business, my entire team was eliminated. I then joined a major international telecommunications company as the knowledge manager for their global proposal team. Just days after I started, the company underwent a massive reorganization, localizing the proposal teams and effectively eliminating my position. The manager of the local proposal team kept me as her team's knowledge manager; however, she was also quite short-staffed as a result of the reorganization.

As she asked me to take on proposal-related tasks, and then to manage complete proposals, I learned proposal management “by the seat of my pants.”

DANI ROGERO • NATIONAL CAPITAL AREA CHAPTER

I used to lead instructional design teams, primarily in Naval Aviation. I was recruited to Electronic Warfare Associates Government Systems, Inc. to develop technical and marketing materials company wide, just as our business model was shifting toward more competitive proposals. The company was Shipley-trained, and I thought “Hey, this is like an instructional design project on steroids.” The “dark side” called to me (and they had cookies; I love cookies). Some co-workers attribute my enthusiasm for proposals to being an adrenalin/stress junkie. Personally, I find proposals safer than skydiving. Plus, the camaraderie of a proposal team feels similar to a team on a mission trip, where strangers gather in a foreign land (aka the proposal room) for a short time to make a difference in the world. It's phenomenal what good teams can accomplish.

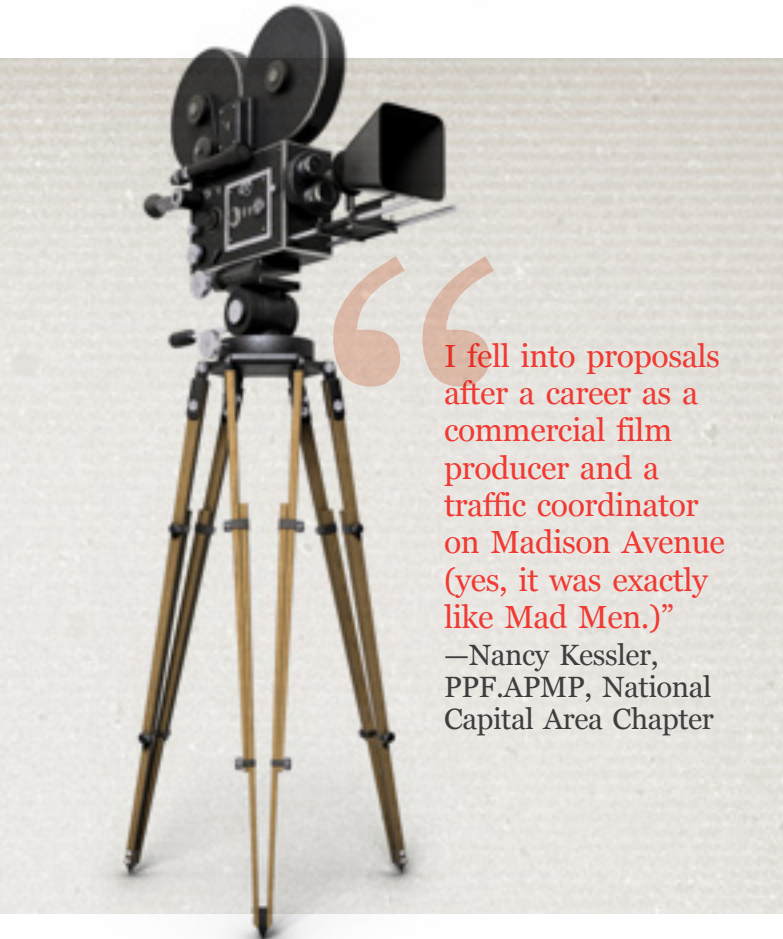
NANCY KESSLER, PPF.APMP • NATIONAL CAPITAL AREA CHAPTER

I fell into proposals after a career as a commercial film producer and a traffic coordinator on Madison Avenue (yes, it was exactly like *Mad Men*.) Motherhood intervened, but I kept playing with computers from home and ended up in the D.C. area as a database manager. The final straw was a project devoted to the development of a résumé database application for a proposal center. The next thing I knew, I was a proposal manager, and I never looked back!

JOHN W. STEVENS JR. • HOUSTON CHAPTER

It was 1979 when I left the U.S. Navy to take a job as a defense contractor for a customer that could not be identified, doing work they could not describe, at a facility, the location of which I was not allowed to know until I had received the proper “access.” About 2 years later, after having worked a rotating shift and driving 120 miles round-trip while asleep, I sought a transfer. I ended up at another customer that could not be identified, at a facility, the location of which I could share with no one, writing requirements specifications for specialized intelligence systems. When my new employer learned that I had been writing specifications for RFQs [Request For Quotations] and RFPs [Request For Proposals], they decided I would be a valuable “proposal” resource. I was given training in the Shipley Method, Hi Silver, and two other capture/proposal methodologies.

For my first proposal, I was assigned as a writer, my second as a volume lead, and my third as proposal manager. After that, it was all but over. With the exception of a total



of 5 out of the last #@ years, I have been associated with proposals as a BD [business development] guy, capture guy, and mostly as a proposal manager. I have finally come to the conclusion that The Borg are right: Resistance is futile.

CHRIS SIMMONS • NATIONAL CAPITAL AREA CHAPTER

I was UNEMPLOYED. Deloitte Consulting had doubled my salary, given me a big signing bonus, and laid me off 2 years later when the telecommunications industry started declining in 2001. Shortly thereafter, a proposal consulting company called me looking for help on a Bank One proposal for the State of Illinois. The next day, I was on a plane and working as a writer for \$75 an hour. The Bank One proposal immediately led to other opportunities at AT&T, Raytheon, ACS, NCS Pearson, and others. During that time, I expanded Rainmakerz Consulting with partners and 1099 consultants I met through APMP. I never really thought I would make a career out of business development consulting. After 120 customers, \$70 billion in new business contracts, and flexibility to spend more time with my family, I finally know what I want to do when I grow up.

OLESSIA SMOTROVA-TAYLOR, AF.APMP • NATIONAL CAPITAL AREA CHAPTER

I remember asking the Washington Bureau Chief of the *Financial Times* who hired me, seeing what I didn't see in myself yet, at what age did *he* realize he loved writing—because I certainly hated it in my mid-20s. But I learned to write fast and well at *FT*. I fell into government contracting at Lockheed Martin as an office manager on a troubled program when four PMs switched over a few months, and took over running it together with the fifth PM. I had to learn nuclear engineering on the fly. After the program was successfully completed, I was roped into writing proposals and learning how to translate technical information into persuasive text and graphics. I started out being a proposal solution architect, and moved on to becoming a capture and proposal manager. I now run a proposal consulting company and Bid & Proposal Academy, publish books and articles, and design courses for proposal professionals.

DAVIDE CEREMIGNA • ITALY

As a computer science engineer, I've worked in Italy since 2000 as a principal consultant, with project manager and service manager roles in IT and CRM projects for a multinational French consulting firm. Since 2002, I've been involved in presales of turnkey projects and IT services as a proposal manager. As I have proven to be able to win some business, in 2011 I was put in charge of the company's bid office. I was certified AM.APMP

I used to manage the sales office of an import-export SME in the fashion accessory industry.”

—Rita Mascia,
UK Chapter



in 2012, and since then I've been involved in several efforts to change the company's processes, policies, and tools as a presales and service management subject matter expert. The next step? Making our customers understand the necessity of proposal management professional growth inside their organizations.

CHRISTOPHER S. KÄLIN • DACH CHAPTER

In 1997, when I was a telecommunications consultant, I was thrown into a mobile license bid project. As we got the multi-billion-dollar mobile license, I was involved in many other bids. Now, 15 years later, I am a bid and proposal evangelist, running CSK Management, a specialized bid and proposal services company. But *my* story is not as exciting as the story told to me by one of my clients: He happened to sit in the wrong job interview (!!!) without realizing it. During the conversation, he got so excited about the job opportunity, he immediately applied for it. And he is still there today!

SHANNON BROWN, AM.APMP • LONE STAR CHAPTER

After graduating college in 2006 and deciding not to continue on to law school, I was lost in my career field. I performed odd jobs in various industries, from title/

escrow to insurance and general accounting. Working part time as a medical billings/AR representative, I knew I needed a new job. I found one as a part-time customer service rep at a small defense contractor. In this post, I paid close attention to when people around me were discussing company strategy. I started coming in early and leaving later. I realized that opportunities are won and lost when business development is married well to the proposals. My boss sent me to Shipley training for foundations of proposal management. I became an accredited member of the APMP. I have since switched companies and am now a full-time proposal developer with many more Shipley classes under my belt. This past summer, I was given the opportunity to manage my first proposal. It was a total success!

ALI PASKUN, AF.APMP • CHESAPEAKE CHAPTER

After graduating high school, I worked as an administrative assistant while taking college classes at night. I eventually got a job with Martin Marietta in the early 1980s, back before proposal management was a recognized profession. Although my position was classified as secretarial, one of my main responsibilities was to support proposal efforts. I joke that if I held the same job today, I would be called a proposal coordinator and make about four times the salary! When Martin Marietta and Lockheed merged, our business unit was closed. I took my proposal skills to other companies, and over the years, my career progressed from administrative assistant to technical writer to proposal manager to proposal director.

RITA MASCIA • APMP UK

I used to manage the sales office of an import-export SME in the fashion accessory industry. Then I applied for a job as researcher at a university and, within 3 months of starting work there, I came up with an idea for an EU grant I had found. The bid was successful, and since then I was asked to work on bids. I got the bug for the job and have not stopped for the past 13 years! Now I've set up my own company and continue to enjoy the work.

C. SCOTT MILLER • CALIFORNIA CHAPTER

I consider myself a paradigm shift promoter and trainer, starting with GE computer presentation graphics in the '70s, desktop publishing print graphics in the '80s, and digital document design in the '90s. In the last decade, I used my Internet editing skills to write several blogs about my new passion—technologies that clean up the atmosphere by converting waste streams into biofuels and biopower. Social media led me to companies that sold and built \$250 million to \$1 billion renewable energy facilities. I helped with their branding and marketing campaigns

“Back then, I never expected to end up in this line of work. But looking back now and describing my various activities of those days, it doesn't seem like much of a surprise.”

—Chris Johnston, MPA,
AM.APMP, National Capital
Area Chapter

and met committed industry leaders at conferences. I became fascinated with what it took to create the content for large-scale business proposals so, after I finished my online MBA, Cortac Group hired me to be a volume lead while I contribute proposal graphics. I love the collaboration and the opportunity to help streamline production of effective, professional-looking proposals.

JODY ALVES • NOR'EASTERS CHAPTER

With a psychology degree, I spent my early post-college years working as a secretary/researcher for an alcoholism program in a psychiatric hospital. From there I went to an advertising/PR firm for 4 years. I was then hired away by one of my clients, a local bank, for which I managed advertising and PR until our bank was swallowed up by mergers. After the layoff, I was a freelance marketing communications writer for almost 19 years for large and small companies and nonprofits. During the freelance period, I got a call from a friend asking if I might want to freelance writing proposals for GTECH Corp. I did and fell in love with the work. I've been with GTECH's business proposals department for 17+ years—the past 5 in-house—and now manage the writing team.

BRIANA COLEMAN • NATIONAL CAPITAL AREA CHAPTER

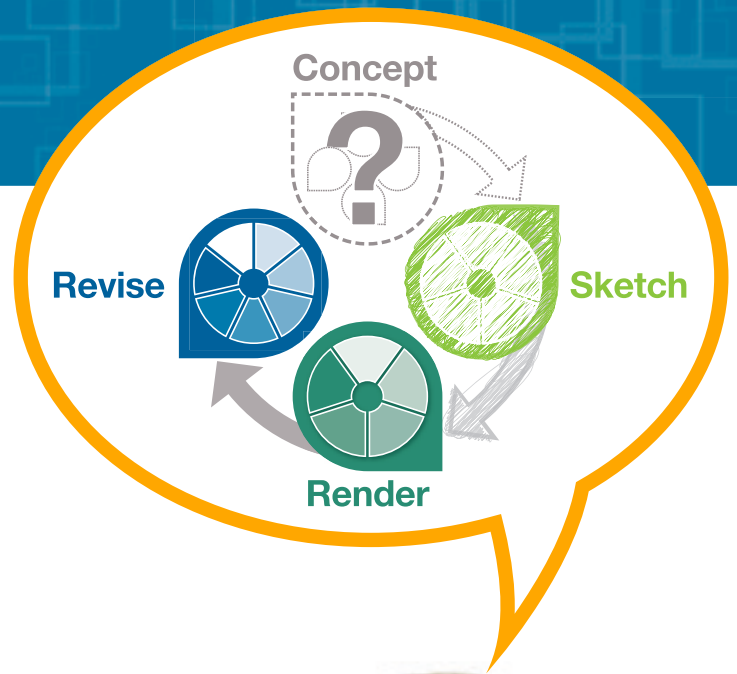
My degree is in psychology (animal behavior), and I wanted to be the next Jane Goodall. I worked as a keeper aide at the National Zoo in the Ape House, caring for the orangutans, gorillas, gibbons, and lemurs. On an average day, I wore



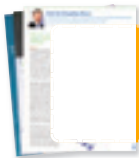
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TRAINING



“This [my] background in journalism helped us all not only with the writing, but also with interviewing subject matter experts, providing critical reviews of proposal sections, and learning about new industries.”
—Patricia Lee Hall,
Nor’easters Chapter

scrubs and cleaned enclosures. It was not infrequent to be face to face with a 600-pound silverback, putting my hand against his mouth to feed him! My grand plan was to move to the Congo and work directly with the animals and conservation societies. Eventually, I realized I had to pay my bills, so I took the first “real” job I could find and started working for a government contractor as a proposal coordinator. My animal behavior background still comes in handy every day as I wrangle unruly proposal teams!

DEAN KNIGHT, APM.APMP • APMP UK

After working in sales for 20+ years, 10 of which were with DHL, I was asked to take over the DHL bid team in the U.K. So after “messing around” in sales for so long and trying to do as little as possible with the bids I encountered, I became the gamekeeper! I did the only thing I could: I made sure I spoke with and met as many people as possible, including Jon Williams and Rick Harris and the many friends I have made in the APMP community. After 2½ years, I can honestly say that the help and advice I have been given have been first class and that I enjoy working in bids. I would not have said so at the beginning.

CHRIS JOHNSTON, MPA, AM.APMP • NATIONAL CAPITAL AREA CHAPTER

I interned with the National Wildlife Federation and lobbied Congress on wetlands conservation issues. That is, I really assisted our top lobbyist by researching legislation, writing and preparing issue papers and briefing books, and covering hearings and committee debates on the Hill. Occasionally, I would accompany our lobbyists on direct visits with congressional staff. Back then, I never expected to end up in this line of work. But looking back now and describing my various activities of those days, it doesn’t seem like much of a surprise.

KERI PANATIER • NATIONAL CAPITAL AREA CHAPTER

I worked as an advocate for adults with developmental disabilities—absolutely nothing to do with proposal management or writing until our statewide contract came up for renewal. I supported that proposal development process as a writer and word processor. I fell into proposal management when I quit that job (without a new job) and attended a college reunion. I met an old friend who said they needed proposal managers. I must have been able to

talk a good game because I landed that job and have been doing it ever since!

ANNA INMAN • APMP UK

After being told my temporary contract was coming to an end, I walked past a recruitment agency that was posting in their window a role for a bid coordinator. The advertisement was brief and mentioned the need to manage a library of responses. I had no idea what it involved. I got the job and had the pleasure of working for an excellent bid manager, Graham Ablett, who trained me well and introduced me to the APMP UK. The advantage I had was that I was trained to manage responses, not just act as a coordinator, and I thank him for that. Eleven years later, I am still in “bids” and hold a combined bid and relationship management role. The keys to success in our profession are the great mentors along our way, and I am certainly lucky in that respect.

MARY ALZIRE PAPADOPOULOS • NATIONAL CAPITAL AREA CHAPTER

I previously managed a horse farm and provided a variety of services related to horse care and riding. In 2004, I was looking for a new career when I was invited to help write a grant proposal for a local community-based organization. I was fortunate to be mentored by a recently retired program officer from a grant-making foundation who taught me from the funder’s perspective—very helpful! Freelance writing on proposals for grants quickly led to work on proposals for service contracts, and I was off and running.

ARMIDA LOWE • NATIONAL CAPITAL AREA CHAPTER

I spent several years trying to be a musician, wandering around the U.S., working on a ranch in Arizona, and eventually heading back east, broken and dejected. I decided to help take care of my grandparents, who both have Alzheimer’s, and started rotating 2-week shifts with my father in rural Alabama. In between cooking pork chops and reminding my grandmother that, yes, she had fed the dog, I also became my father’s unofficial part-time proposal assistant, building proposal skeletons and dotting a few i’s to make some extra cash. Eventually, I went back to my home state of Maryland to work as a truck driver. Seeing me floundering, my father helped me get my first job as a proposal writer. Almost 1 year later, I now have a profession that could allow me to work from home... or on the road. (You know, if the music thing ever works out.)

SAMANTHA ENSLEN • NATIONAL CAPITAL AREA CHAPTER

Back in the day (1995), I was a young woman working as the volunteer coordinator at the Rape Crisis Center. D.C.’s infamous mayor Marion Barry landed the city in a financial crisis, and the center lost all city funding overnight. My position

was cut. I found a job at Jolt n’ Bolt, a coffee shop in D.C.’s Adams Morgan neighborhood. And in my free time, I began to study editing. I guess I had a knack for it, because I was soon brought on as a freelance editor in Computer Sciences Corporation’s (CSC’s) proposal shop in Falls Church, Va. CSC hired me full time after about a year of evening, overnight, and weekend work ... and the rest, as they say, is history. I now run my own agency, Dragonfly Editorial. To this day, proposal editing is a big part of our work. I’ll always be thankful to the folks at CSC who took a chance on an inexperienced young editor so many years ago.

CHRIS LAFOUNTAIN, APM.APMP • NOR’EASTERS CHAPTER

I left a desktop publishing job to pursue my marketing MBA full time in 1999. Upon graduating, I was looking for a job. ANY JOB. A former employer asked me to return as an RFP coordinator. Soon I discovered that my skills in project management and visual communications were a natural fit for this type of work. Many of my proposal colleagues have since moved to new lines of work, but for me, this fits. I’ve been a member of APMP for years, have spoken at two APMP conferences, and reached Practitioner Level of accreditation. So I guess this has “stuck” with me.

KRISTIN DUFRENE, APF.APMP • NATIONAL CAPITAL AREA CHAPTER

I was a technical writer working on “Appendix G” of the original Reserve Component Automation Systems (RCAS) requirements document (1988). Unknown to anyone working on the contract, it was up for recompetete, and the company used “corporate staff” to write the proposal. We lost, and everyone got their pink slips the same day. While we were all at the local bar at 3 p.m., HR called my home phone and left a message saying, “We don’t have another contract to put you on, but we don’t want to lose you. Would you be willing to work on a proposal until we find something else for you?” I showed up the next morning in the proposal center and didn’t leave until 3 a.m. Twenty-five years later, I’m still working on proposals, have never been laid off again, and have an unwavering passion for winning recompetetes!

LORISSA NORD • ANZ CHAPTER

Young and idealistic, I had always wanted to work in the intellectual world of book publishing, so whilst studying for my Master of Publishing and Editing, I began my first publishing job in magazines. After a few of the most poorly paid months of my life, albeit offset by champagne and shoulder rubbing, I started to crave a world without air kisses and photo shoots. My love of words and crafting a story are what first pushed me towards publishing, so when I saw the job description for proposals coordinator at an ASX Top



“From selling milk, eggs, vegetables, and meat for a grocer to occasionally selling bologna to the government.”
—Gabe Cabrera, Colorado Chapter, on his proposal manager work today

50-listed company, I jumped at the chance to do the exact opposite of “glamorous” magazine publishing—proposal writing for a global financial services organization. Two years on, I’m still haunted by late nights, but now the morning after holds the potential for a win—not a hangover.

CHERYL BUSENLEHNER • GEORGIA CHATTAHOOCHEE CHAPTER

I was a programmer in a former life, and writing all of the user guides and training materials for the software was my favorite part of the job. I really enjoy interacting with people in a team environment, so when the proposal specialist position became available at my current employer, I pulled the lever and jumped track. I find that proposals suit my personality A LOT better than programming, but I still get all the fun of hard deadlines and something new to work on regularly.

EDNETTE TERRY • GREATER MIDWEST CHAPTER

During a layoff, my supervisor (a partner at an A/E firm) assured me, “If ever an opportunity opens in the future, I will keep you in mind.” Several months later, he contacted me. He had called to offer me a business development coordinator position. Though flattered, I had ZERO marketing experience, no understanding of proposal development concepts, and very little technical writing experience. He thought it was an excellent career move for me, so I accepted the offer. Immediately recognizing the steep learning curve ahead, I researched and digested every nugget I could find about proposal processes and marketing. Eleven years later, I’m still addicted and grateful that he “kept me in mind.”

PATRICIA LEE HALL • NOR'EASTERS CHAPTER

I’ve long thought that it would be interesting to see people’s backgrounds pre-“proposal world.” My proposal story is this: I’d been a professional writer-editor for many years before joining Accenture as a senior proposal writer. Stan, my boss there, was creating an in-house editorial team to support proposal/BD [business development] efforts. Because he knew the proposal world could be taught—but good writing and editing were a “must”—he looked for people with a journalism background. This background in journalism helped us all not only with the writing but also with interviewing subject matter experts, providing critical reviews of proposal sections, and learning about new industries.

TONY SHIFFLETT, MA, MBA, AM.APMP • NATIONAL CAPITAL AREA CHAPTER

I fell into proposal work because I was a competitive intelligence guru at Northrop Grumman. I had to put together reports and presentations on our competition, and one thing led to another ...

ROB WEAVER, AM.APMP • APMP UK

I have always been a bid “manager” or at least a bid “writer,” I guess. As a consultant, I wrote bids or “tenders,” as we more often called them, and when successful, provided the consultancy to implement the project in question. For the last few years, I have started to describe myself as a “bid manager,” in that my job title says this is what I am. I no longer deliver the services I bid for but manage the bid production phase as well as produce content. A subtle change in some ways, but actually a fundamental one. I

attained APMP Foundation status in 2012. What is interesting is that whilst I certainly did (unknowingly) use APMP good practices in my previous career, the terminology used by a bid manager is very different from that of someone who “manages bids.”

ROBERT BUNNETT • CALIFORNIA CHAPTER

I worked proposals at McDonnell Douglas and worked programs we won—proposal, program, proposal. We also had been hiring the original SM&A consultants since the early ‘80s. As a result, I received tremendous composite training in “how” to win. In the early ‘90s, we reached the point on a large classified national proposal that we decided to hire one fewer SM&Aer, and so I led development of a 100-page conceptual design document. It took me awhile to realize that I was responsible for cost, schedule, design AND leading a full-up proposal volume, while my peer SM&A consultant volume leads each only had similarly sized volumes to lead! The grass WAS greener on the other side!! That was 20 years ago. Shortly afterward, I joined SM&A to lead proposal development full time.

GABE CABRERA • COLORADO CHAPTER

First stop out of college = district manager of grocery stores = recruiting new district managers = new job as recruiter in

commercial company = promoted to sales role in commercial company. We win government work—all of a sudden we’re a defense contractor. Co-workers start calling me a “business development guy” = assisting with writing/managing proposals. Our senior vice president says, “Hey, you’re good with proposals. You want to be my proposal coordinator?” I ask, “What’s it entail?” and she replies, “You’ll be great at it; I’ll teach you everything you need to know” = 5 years later and in my current role as a proposal manager. You can take the grocer out of the meat department, but you can’t take the bologna out of the grocer. Or something along those lines. From selling milk, eggs, vegetables, and meat for a grocer to occasionally selling bologna to the government.

LEROY WILLIAMS JR. • NATIONAL CAPITAL AREA CHAPTER

I was an unemployed journalist whose first cousin worked as a project manager for an environmental engineering firm in 2000. As we traveled from New Jersey to Philly to a Reds-Phillies baseball game, he advised me to check his company’s website. So I did, and there I found the title “proposal coordinator,” which required a degree in journalism. I applied, and then my cousin talked me up to the proposal center manager who interviewed me, then hired me 3 weeks later. The next 6 years were among the most eye-opening, stressful, and rewarding of my working life. ●



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REDACT

TIPS

FOR

Effective

REDACTION

IO!

Meanwhile, late on a damp evening at Hogwarts, Harry and Ron were finishing their proposal to the Ministry of Magic. "It says here in the RFP that any mention of 'He-Who-Must-Not-Be-Named' must be redacted from our proposal," said Ron. "What do you think that means?" Harry sighed. "Now we're going to have to find all the places we wrote Voldem... sorry, 'You-Know-Who,' and ink each one out so nobody can read his name."
"Bloody hell," said Ron with an exasperated look.
"Exactly, Ron," replied Harry. "Exactly."
Hermione entered the room and rolled her eyes at the two boys. "Did you two learn nothing? VOLDEMORTIUM REDACTIO!"
As if by magic, since it really was by magic, thick black lines appeared in the proposal, completely covering every instance of Lord Voldemort's name.
"Bloody hell!" exclaimed Ron.
"Exactly Ron," replied Harry. "Exactly."

By Dick Eassom, AFAPMP

Depending on the subject matter, we are sometimes asked to redact, i.e., to obscure or remove sensitive information from a document prior to release.¹ This operation is very common when previously classified government documents are finally released to public record—some elements may remain sensitive and are thus redacted. (In the extreme case, all the text on a page may be blacked out, making one wonder why the government bothered releasing it in the first place.)

In our proposal-based situations, we simply have to block out certain words in our final document. We normally perform this operation at the end of proposal development, after final document integration and layout. If we are using Microsoft Word, how can we effectively obscure selected text (or graphics) without affecting the final document layout? After all, we don't have magic wands (although some of our colleagues think we do).

REDACTION METHODS

The point of redaction is to ensure that the reader cannot extract the original information from the redacted version of a document. For printed materials, redaction is easily

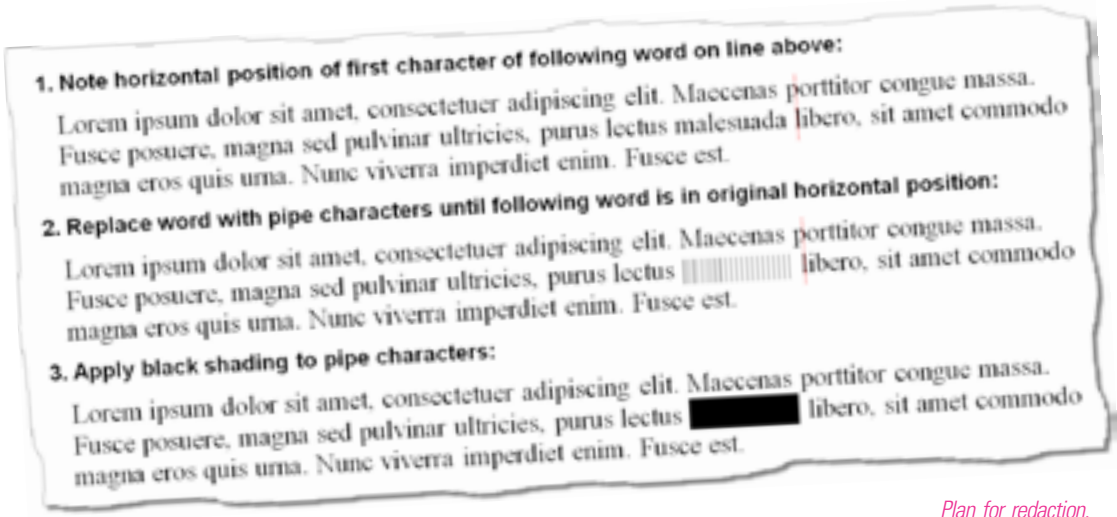
done by covering the text or graphics with black ink or paper and then photocopying the redacted document.

However, this method, although inherently reliable, is no longer always practical since most proposals are required electronically and only optionally in their printed-and-bound form. If we try to use the same methods in Microsoft Word, a recipient can easily remove the black shapes that we inserted to cover the redacted text or graphics, revealing the original content. Even if we save our Word document to a PDF document, the recipient can easily remove these shapes using Adobe Acrobat Pro or a similar full PDF editor.

Another less-than-optimal method is simply adding a black background (or black highlight) to black text. It may look like you can't read the redacted text, but it can be simply copied and pasted into another document with the formatting and easily read, even after saving to a PDF. In April 2011, the UK Ministry of Defence published a PDF document online under the UK's Freedom of Information Act (FOIA), and sloppy redaction inadvertently revealed information about nuclear submarine security! Cybersecurity industry leader SOPHOS has the details on their Naked Security website at <http://nakedsecurity.sophos.com/2011/04/18/how-not-to-redact-a-pdf-nuclear-submarine-secrets-spilled/>. Oops.

There are two interesting points in this article. First, SOPHOS provides a link to Adobe's website detailing how

1. Redact: Middle English *redacten*, from Latin *redactus*, past participle of *redigere*, "to drive back." First used in the 15th century.



Plan for redaction.

of the remaining text. So how can we easily redact text in our Word documents and not affect the overall layout?

MANUAL REDACTION: CHARACTER SUBSTITUTION

The simplest method for manual redaction is to replace the characters in the text

to redact a PDF document correctly using Acrobat X Pro: See <http://blogs.adobe.com/acrolaw/2010/06/ricks-guide-to-using-redaction-in-acrobat-x-pro/>. (I have Adobe Acrobat 9 Pro and found the redaction tools under Advanced > Redaction.) Acrobat Pro has very comprehensive redaction tools, and I recommend that you read this article if you are redacting PDF documents.

Second, echoing the sentiment on the Adobe website, it states, “... remember that simply marking text will not actually remove it from your sensitive PDFs. You also have to apply redactions!”

REDACTING SAFELY IN MICROSOFT WORD

The U.S. National Security Agency (NSA) has published a guide, titled “Redacting with Confidence: How to Safely Publish Sanitized Reports Converted from Word 2007 to PDF,” on its website at http://www.nsa.gov/ia/_files/I733-028R-2008.pdf. Whereas I agree with the basic process in this document, the NSA method for redacting text is to simply remove it, or if this affects formatting, to replace it with dummy text, e.g., “xxx.”

Proposal development processes emphasize planning before writing, such that the layout of the final document can be controlled, allowing each content topic a controlled amount of column space and graphics. Proposal production carefully integrates final text and graphics, producing perfectly laid-out documents that conform to all RFP formatting requirements (e.g., font sizes, margins, and page count limits). So simply removing text to be redacted is not a suitable method, and replacing it with dummy text will make the non-redacted text harder to read and comprehend.

Ideally, we should be able to “black out” the text to be redacted, ensuring that this text is completely deleted from the document. A black box in the middle of a line of text makes it clear that the black box is replacing sensitive text and does not detract from the overall context

to be redacted with one non-text character in a black font, repeated as often as necessary, and then apply a black highlight or background shading. For maximum flexibility, I recommend a narrow character that will allow you to match the length of the word to be redacted (e.g., the “pipe” character, |, located in the top position of the backslash key on a U.S. keyboard).

To maintain your carefully formatted and laid-out document, there are three steps to follow, as shown in the figure above. In this example, you must redact the word “malesuada.” Note that the “l” at the start of the following word, “libero,” is positioned at the back of the “p” in “porttitor” on the line above. Delete “malesuada” and then type pipe characters until the “l” in “libero” is back at its original horizontal position. Finally, go to Home > Paragraph > Shading, and apply a black background to the pipe characters.

MANUAL REDACTION: GRAPHICS

You can easily redact graphics by replacing the graphic with a black square with the same dimensions. Make a note of the height and width of the existing graphic and then delete it. Go to Insert > Illustrations > Shapes and select the rectangle shape. Draw a rectangle of the approximate size, and then fix the size of the shape to match the original graphic. Change the fill color to black to complete the redaction.

Alternatively, have a graphic artist create a black 1 x 1 pixel bitmap. You can then insert this as a picture to replace the original graphic. You can resize this bitmap to any dimension without increasing the file size. (It only looks bigger!)

AUTOMATED REDACTION: MICROSOFT WORD REDACTION ADD-INS

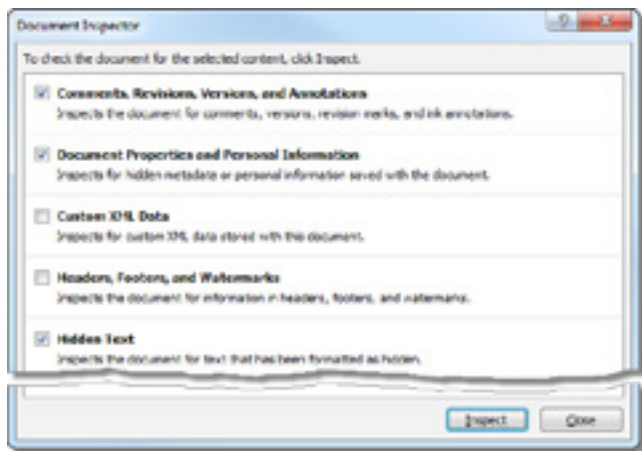
If you have a lot of redaction to do, then an automated tool is useful. In 2006, recognizing this need, Microsoft published an add-in for Word 2003, “Word Redaction

1.2,” which is still available in the Microsoft Download Center at <https://www.microsoft.com/en-us/download/details.aspx?id=10155>. However, most of us have moved on to at least Word 2007, and this tool will only work with Word 2003.

There is a version available for Word 2007 and Word 2010 at <http://redaction.codeplex.com/>. Note that this is offered “as is” and is not officially supported by Microsoft. Also note that you will need to install the Microsoft .NET Framework 3.5 Service Pack 1, and the Microsoft Visual Studio Tools for Office (VSTO) 3.0 Runtime Service Pack 1

The setup program for the add-in will automatically download and install these items if they are not already installed, but I know this can cause issues with some corporate PCs, so check with your IT department first.

Once installed, this tool allows you to mark text for redaction (with 25-percent gray background shading), or find text and mark it and then redact all marked text in the document. The tool replaces all text for redaction with single quote characters in a black font with a black highlight. (The previous version for Word 2003 used pipe characters.)



Plan for redaction.

BEYOND REDACTION

As I detailed in “*Down the Rabbit Hole*” (*APMP Perspective*, Spring 2004) and “*Down the Rabbit Hole Again*” (*APMP Perspective*, Winter 2008), Word documents can contain sensitive information beyond the obvious text and graphics content. For example, you may have document properties that show the names of individual authors—information you would not want to share with a recipient. This is also detailed in the NSA redaction guide mentioned earlier in this article.

Fortunately, Word 2007 and 2010 both come with a built-in tool, the Document Inspector, to remove this hidden metadata. In Word 2007, click the Office Button and then go to Prepare > Inspect Document. (In Word 2010, go to File > Info > Prepare for Sharing > Check for Issues > Inspect Document.) Make a copy of your document, since data removed by the Document Inspector cannot be recovered. Word displays the Document Inspector dialog box:

Unless you are submitting a revised document and have to show revisions, then always check Comments, Revisions, Versions, and Annotations.

- Always check Document Properties and Personal Information. You can add a title, subject and author (e.g., your organization’s name) later.
- You should probably check Custom XML Data, although I doubt you are using this feature.
- Do not check Headers, Footers, and Watermarks, unless you want the tool to delete your document’s headers and footers, which you probably do not!
- Always check Invisible Content (Word 2010 only).
- Always check Hidden Text, since there is only one legitimate use for hidden text, i.e., to create a heading numbering sequence with missing values.

After you have selected your options, click Inspect. Word will inform you of what it found, and allow you the opportunity to remove the offending data. Do this before you submit your documents, even if you are submitting them as PDFs—some metadata is carried over to the PDF when you save it.

If you are still using Word 2003, or Word 2002 (i.e. Office XP), Microsoft provides a free downloadable add-in, the Remove Hidden Data tool, at <http://support.microsoft.com/kb/834427>.

On those rare occasions when we have to provide a document with redacted text and/or graphics, there is a simple manual method, described above (for when we only have a limited amount of content to redact), and free Word add-ins with comprehensive features (for when we have a lot of content to redact). And do not forget to check for hidden metadata that you might not want the recipient to see! ●

Dick Eassom, AFAPMP, is the author of “*Wordman’s Production Corner*,” published in the *APMP Perspective*. Eassom is an accredited APMP Fellow, a recipient of the APMP William C. McRae Founders Award, and works as an independent proposal management consultant and trainer. Eassom can be reached at (949) 769-0312 and + word.man@cox.net.



Global
Virtual Team
Members'

Perceptions of Leader Practices

By Dr. LaBrita Cash-Baskett, CCC-SLP, AM.APMP

Virtual team effectiveness

depends on the willingness of team members to be productive, engaged, and motivated. Several issues and trends in business have emerged over time leading to the increased use of teams.

The focus of this study is on the extent to which leadership communication factors are important to effectiveness from a team member's perspective. There were gaps in the literature related to leadership communication and best practices in global virtual teams that necessitated this study.

Team leadership and communication are two essential factors for effectiveness. This exploratory study sought to identify the extent to which leadership communication factors are important to team effectiveness and to discover best practices from the member's perspective in real global virtual teams. Three questions were asked:

- 1 From a team member's perspective, what are the skills, attributes, and characteristics that contribute to effective leadership communication in virtual team environments?
- 2 To what extent do leadership communication factors most influence members to be effective?
- 3 Leaders need to inspire willingness to be productive, boost morale, engage members, encourage participation, and efficiently utilize collaboration tools and technology. What can leaders do to influence these factors?

The findings of this research, which are based on a small sample within the proposal industry, suggest there are leadership communication competencies that are perceived to be important to the effectiveness and inspiring to the willingness of participating members to be productive, motivated and engaged. Although the findings are not surprising, a better and deeper appreciation for empirical research findings can be gained from the outcomes of this study. Findings in the study validate existing literature and lay the groundwork for future research on actual global virtual project teams.

Based on the findings, the study reveals the following top-line recommendations for the development of competencies across five dimensions:



Training and Development: Provide leader education through training, mentoring, and coaching on the management of people in addition to processes necessary for team effectiveness.

Resources: Provide tools to support effective use of technology, planning, and communications.

Engagement Communication: Ensure organizational values are articulated and enacted by all levels of leadership to promote engagement and alignment.

Team Building: Consider the importance of communication skills, cultural competence, and interpersonal effectiveness for leaders on the recruitment, selection, and retention of talent.

Performance Metrics: Consider cultural differences in performance management and appraisals.

Processes should include ongoing feedback, role clarity, expectations, and support, and should involve multiple stakeholders. ●

Dr. LaBrita Cash-Baskett, leading business communication industry expert, can be reached at + www.fundamentalfocus.net or the dissertation link for the complete research study: *Global Virtual Team Members' Perceptions of Leader Practices Dissertation*.

Participants in the study were selected from proposal participants in the Association of Proposal Management Professionals (APMP). A qualitative and quantitative mixed method design was employed.

Book Review

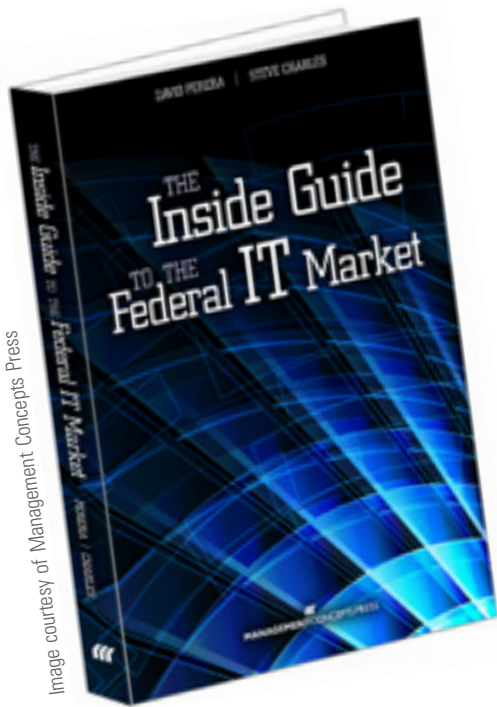


Image courtesy of Management Concepts Press

The Inside Guide to the Federal IT Market by David Perera and Steve Charles

Reviewed by Cindy Garrett

The Inside Guide to the Federal IT Market describes in detail how to sell to the federal government and takes an in-depth look at the working aspects of the different agencies. David Perera's and Steve Charles' extensive experience in working with the federal government is reflected in their book. They did an exceptional job of interviewing several people to assemble their actual experiences—and sometimes frustrations.

The book covers a wide range of target markets, from the small business just getting started to the large corporation with years of experience. It also points out in detail the purchasing processes of the government and the different purchasing vehicles they use. Perera and Charles talk about building relationships with government contractors and key personnel and how important relationships are when trying to do business with the federal government.

I found the following quote from the book to be true for both the

federal government and the public sector when trying to win business: “Every company proposal in a full and open competition gets fair consideration, but even a well-written one that betrays a lack of fluency with the current government thinking likely won’t get an award—especially if your proposal is the first time they’ve seen your name.”

The federal IT market budget and spending habits, which were current at the time of printing, are clearly defined in this book. With the tens of billions of dollars the

federal government spends on IT each year, this market represents a huge opportunity. However, to win this business, you need the education and skills that Perera and Charles describe in detail. This is an easy-to-understand and logical guide that takes the reader through all the pertinent steps.

The Inside Guide to the Federal IT Market will definitely give you an advantage when seeking to successfully win business with the federal government. ●

Cindy Garrett, AM.APMP, has been the proposal manager for Avaya, Inc., for the past 7 years and works in federal sales and management. She can be reached at + garrettc@avaya.com.

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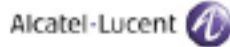


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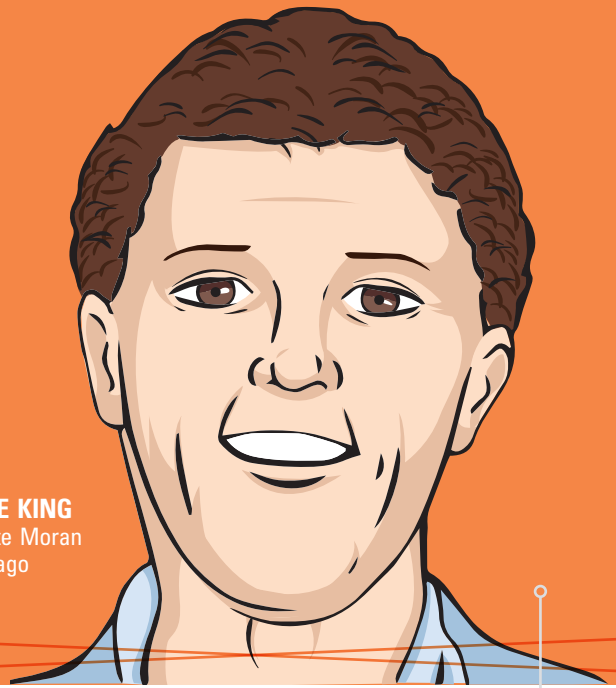
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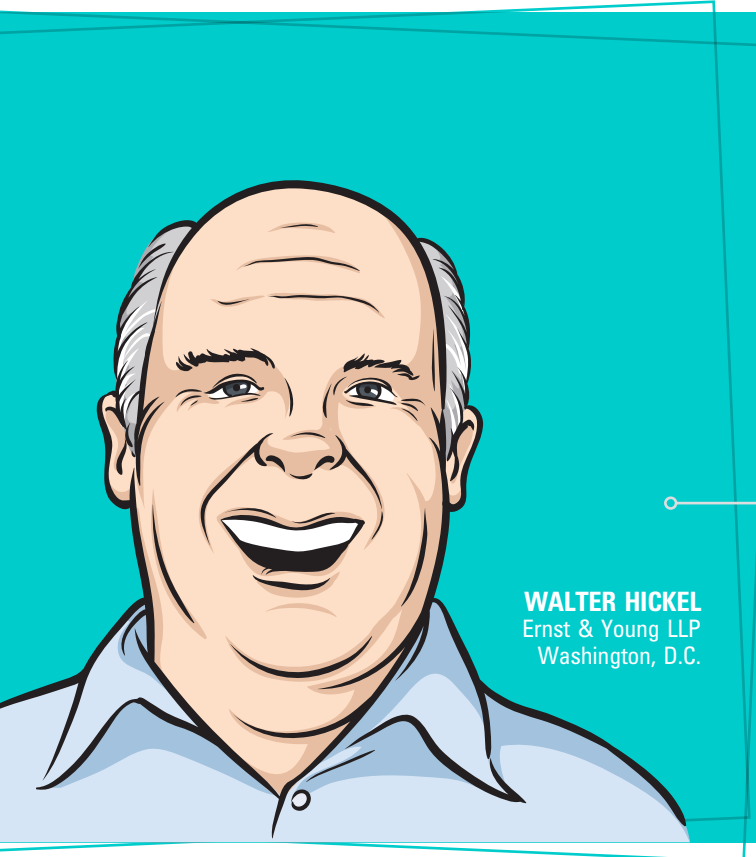
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ANSWER

When preparing for a proposal, I use LinkedIn, Facebook, Twitter, and YouTube to study an organization's culture and personality. Based on the content, pictures, and videos an organization shares, I can better understand a prospect and, in turn, compose messaging and select imagery that will help create an emotional connection. In addition to a computer, the number-one technology tool I use is a phone. Strong communication is the foundation to great relationships and sometimes that simply means picking up the phone.

ANSWER

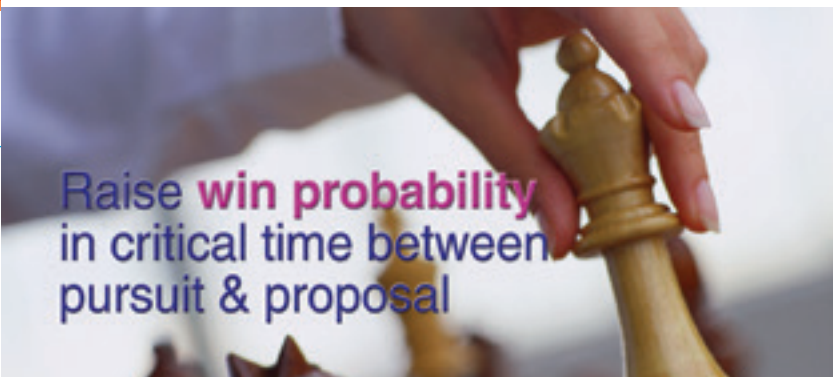
I don't have a Facebook account for privacy reasons. I don't really have an idea what Twitter is or what it can do for you, only the preconceived notion that it's used most often to distribute short bits of drivel to a lot of people. No way could I ever communicate matters relating to pursuits and proposals in this manner. Much of the info I need to write proposals is dispersed among partners and other team members, which are often located in different countries. I have to corral these sources of information and, in my experience, the phone is the best way to do so in a pinch.



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