

Journal



Your Professional Guide to Winning Business

VOLUME 9 NUMBER 11 2017

+

Data That *Drives*

EXPLAIN THAT TO ME
LIKE I'M A 5-YEAR-OLD

#SOCIALBIDDING IN A
BRAVE NEW WORLD

HOW TO MAKE AN
INFOGRAPHIC GO
VIRAL IN 5 STEPS

ONE SECTOR FOR ALL:
APMP'S NEWLY LAUNCHED
BUSINESS SECTOR

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DATA THAT DRIVES

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IT'S TIME TO BANG A FEW POTS

We have accomplished so much in the last few years together at APMP, but the one question I heard more than any other at this year's Bid & Proposal Con in New Orleans was, "What are we going to do next?"

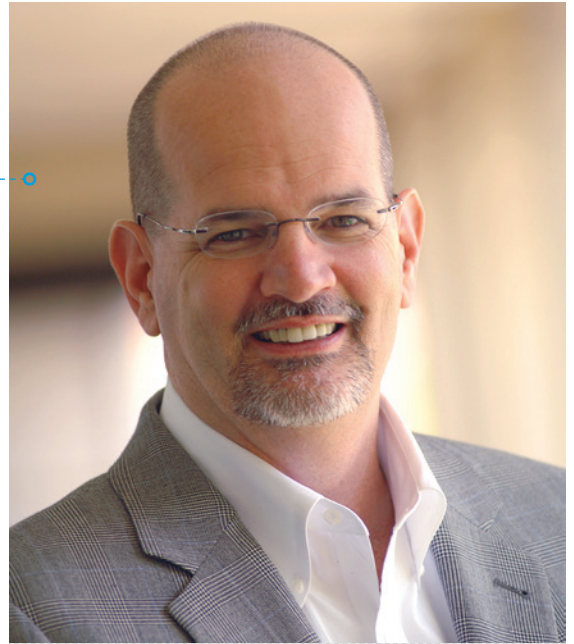
It's a fair question and a reasonable expectation from our members. To keep growing the industry and the profession, we need to always be looking for what's next.

APMP is about to elevate this industry like never before—through the most ambitious press and public relations campaign our industry has ever seen.

APMP is a family of professionals who bids, proposes, writes, edits, strategizes, captures, plans, and executes as good as or better than any profession in the world. We've often said that bid and proposal professionals are the unsung economic heroes in their companies. Without your expertise in winning work, most companies would be challenged to keep the lights on and the parking lot full. We need to share that story and its powerful message with others.

APMP is going to execute a press and PR campaign in 2018, and focus on you, our members, to tell your story. We are going to pitch newspapers, business magazines, radio, television, and educational journals about the importance of our profession to our country's economy. We're going to show how our members are the leaders of their local economies and the champions for job creation in their communities.

An APMP Marketing Committee will focus on the stories and the people that make up APMP and our incredible industry. It's important for APMP members to be known for what they do and what it takes to win, both internally and externally.



You'll see every article and every mention of APMP and its members. We will put our members out front so people in your company know exactly what you do and how it contributes to their success.

To go to the next level as an industry, we must stand up and step forward. We must bang and clang a few pots together to get noticed, and that's exactly what APMP intends to do. Stay tuned—our industry and its professionals are about to be discovered.

RICK HARRIS, CF APMP

Executive Director

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MAKING A MARK

As I begin the home stretch of my year as APMP's chair, I've taken some time to reflect on my career and the people who have made an enduring mark on me professionally. I have been so fortunate to have mentors, colleagues, and friends who have inspired, challenged, and supported me throughout my career. For a person who didn't plan on a career in proposals (Does anyone?), to end up as leader of the finest group of proposal professionals in the world has been a humbling and incredibly rewarding experience.

This year's Bid & Proposal Con in New Orleans catered to a record-breaking number of attendees. While I'd like to think that, based on my Louisiana roots, the fabulous city of New Orleans was the draw, the reality is that our industry is growing and evolving. More proposal and bid professionals from around the world are turning to APMP for guidance and best practices. The caliber of presenters and participants alike reaches higher levels with each passing year, and it's been an awe-inspiring trend to watch unfold.

More than 20 years ago, when I discovered the networking and peer interaction offered by APMP and chapter events, I felt as if I had found a home. Much later, I decided to get involved in volunteer leadership—because, just as this association had left a mark on my career, I wanted to leave a personal mark on the profession. It was a decision that turned out to be more rewarding than I could have ever imagined.

I would encourage you to find ways to leave your mark as well. Serve your chapter in a volunteer capacity or, if that's too much, serve your fellow proposal managers at work in a volunteer capacity. Arrange webinar-viewing lunches and networking events around APMP's monthly webinar series, share a copy of the *Proposals for Dummies* book with your subject matter experts, or print some pertinent topics from this issue of the *APMP Journal* to circulate around the break room. If we're all dedicated to the cause of perpetuating



best practices in our profession, we are all afforded opportunities to make our mark on this evolving, exhausting, and exhilarating industry.

Thank you for your support this year, and thank you for all you do to advance the profession. Together, there is no doubt in my mind that we are leaving a significant mark for those who follow in our footsteps. It's been an honor to serve as your chair, and I wish Jamie Ninneman every success in his year as our 2018 chair.

KRISTIN DUFRENE, CPP APMP FELLOW

APMP Chair

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ASSOCIATION NEWS

APMP SUPPORTS HARVEY VICTIMS

APMP established a relief fund to assist APMP members in the Houston area impacted by Hurricane Harvey, raising nearly \$18,000 in the immediate aftermath of the storm. APMP supported about 100 of its members from Houston and surrounding areas that were impacted by the natural disaster in August. Hurricane Harvey caused over \$180 million in damages, displaced more than 1 million people, and seriously damaged 200,000-plus homes.

Partnering with APMP's Lone Star Chapter, APMP International contributed \$10,000 in relief aid, which was bolstered by additional donations from individuals,

chapters, and vendors supporting the industry. Every member from the Houston area received a gift certificate for either food or help to repair their property, and APMP waived their 2018 membership fees.

"Houston-area APMP members, many of whom are our colleagues and friends, are just moving back into their homes and have immediate need for food and home repair," said Rick Harris, executive director of APMP, shortly after the storm. "We want to help with an initial gift and hope we can provide even more help in the coming weeks." ●

ACCOMPLISHMENTS CELEBRATED AT NEW ORLEANS CONFERENCE

In June, APMP announced its annual award winners at the 2017 Bid & Proposal Con in New Orleans. "As the association and the profession continue to grow and evolve, it becomes increasingly difficult for our judging panels to select just one winner in each category," said Executive Director Rick Harris. "This year's winners stand apart from the field for their dedication to excellence on behalf of the profession."

The following 2016 APMP awards were announced:

APMP FUTURE LEADER AWARD

Jennifer Giraldo, Valley of the Sun Chapter

APMP CHAPTER PROGRAMS/SPECIAL EVENTS AWARD

APMP Australia/New Zealand (ANZ) Chapter

APMP CHAPTER COMMUNICATIONS AWARD

APMP National Capital Area (NCA) Chapter

THE STEPHEN P. SHIPLEY AWARD

FOR CHAPTER OF THE YEAR

APMP UK Chapter

CHAPTER WITH THE HIGHEST MEMBERSHIP GROWTH

APMP National Capital Area (NCA) Chapter

JOHN ELDER APMP JOURNAL AWARD

Chris Sant, "Irrefutable Evidence, Four Steps to More Persuasive Proposals" (Spring/Summer 2016)

WEBINAR AUDIENCE AWARD

Proposal Software Inc., Tammy Dungan and Ellen Bossert, "Where Content Is King"

CHAPTER CHAIR OF THE YEAR

Kumiko Shikimachi, APMP Japan

EVOLVING CHAPTER OF THE YEAR

APMP Liberty Chapter

FELLOWS

APMP Fellows are recognized as having accomplished the association's highest individual honor and lifetime achievements in the profession.

Hélène Courard, CF APMP Fellow, Unisys

Klaus Pohlmann, CF APMP Fellow, CSK Management

Suzanne Jones, CP APMP Fellow, Northrop Grumman ●



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Professional training...

- Capture management
- Proposal management
- Proposal writing
- APMP Foundation-level Certification preparation and exam
- Winning business for project managers
- Winning GWACs, IDIQs and task orders
- Proposal reviews for federal contractors



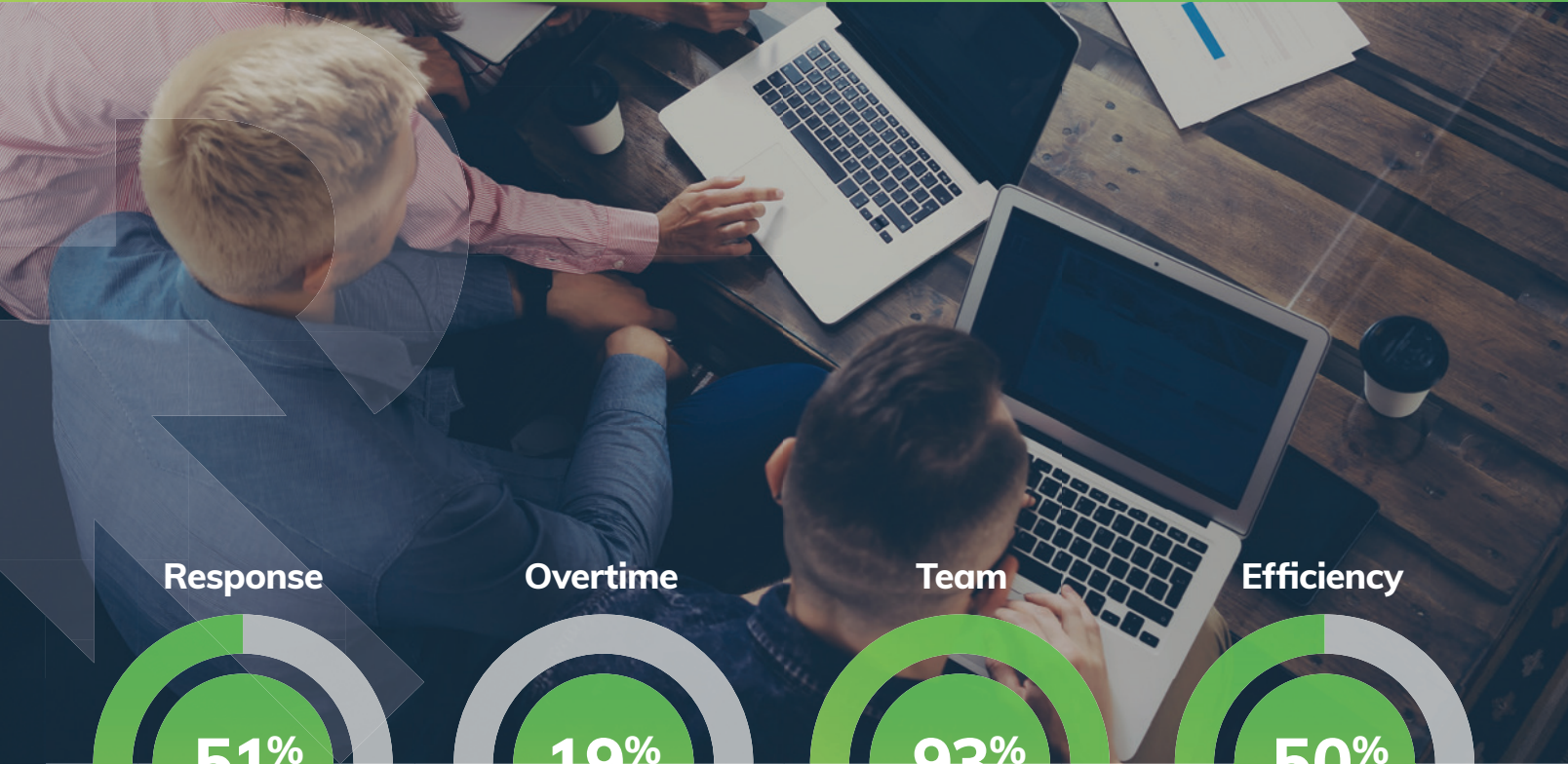
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stages

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PROPOSAL MANAGEMENT

Using G Suite to Better Manage Proposals

The Philly Cheesesteak Model for Winning Oral Presentations

By Larry Tracy

CONSTRUCTING A WINNING oral presentation as you would a sandwich can literally bring in the dough. Not any sandwich, mind you, but that Philadelphia classic—the cheesesteak. It can be the model for a winning oral presentation based on three similar components:

1. The bottom half of the roll is the opening statement by the project manager (PM) outlining the company's solution to the RFP.
2. The steak and cheese are the technical solution to the RFP requirements.
3. The top half of the roll is the closing statement by the PM, forcefully reiterating why the company presents the best value to the customer.

The genuine Philly cheesesteak is superior to poor imitations because the rolls come from Amoroso's, the famous South Philadelphia bakery. These hearth-baked rolls enhance the taste of the steak and cheese. The technical oral presentation can likewise be augmented with a discriminator—emphasizing the opening and a powerful closing statement, convincing evaluators that this company provides the best value.

THE CHEESESTEAK AS A MODEL

The opening statement (bottom roll) by the PM outlines the unique

solutions the company is offering, hopefully creating a favorable initial impression among the evaluators.

It must include:

- 1) past performance on similar projects;
- 2) capabilities

separating this company from competitors; and 3) credentials of the PM and the technical experts. The closing statement (top roll) reiterates those discriminators, causing evaluators to conclude that this is the company that should be awarded the contract.

PRACTICING BY SIMULATING

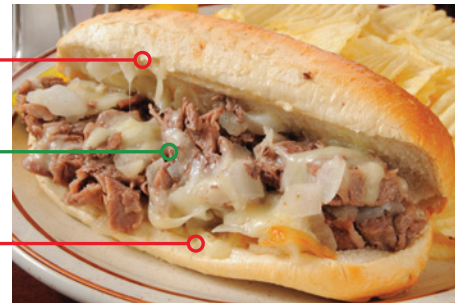
A series of “murder boards” simulating the oral presentation and the Q&A session is mandatory. The technical presenters (the steak and cheese) are very good at their specialties, but they are not accustomed to making “sales presentations,” meaning that they will need several intensive, video-taped rehearsals. The proposal writers should play the role of the evaluators to help the presenters anticipate questions and develop answers. The PM must rehearse the opening and closing statements several times to deliver them with clarity and passion.

These simulations provide the team the opportunity to develop a cohesive, persuasive case that it provides the best solution to the RFP requirements. Evaluators are looking for

CLOSING STATEMENT

TECHNICAL SOLUTION

OPENING STATEMENT



technical competence from likeable presenters who are able to tell a persuasive, customer-oriented story and work well as a team. A team that cannot present efficiently casts doubt on how it will carry out the contract.

A FINAL THOUGHT

Lawyers say the opening statement and closing argument are the most important part of a jury trial, as jury members remember most what they hear first and last. In an oral presentation, the evaluators are the jury. To increase their chances of winning the bid, companies would be wise to follow the advice of trial lawyers and apply the Philly cheesesteak model to the oral presentation. ●

Larry Tracy is an author and a principal at Tracy Presentation Skills, an authority on presentation skills training for corporate and government executives. He can be reached at www.oralscoach.biz or ltracy3936@aol.com.



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Explain That to Me Like I'm a 5-Year-Old

TAKE A MOMENT TO STEP BACK AND DEFINE THE SOLUTION

By Javier Suarez

GEORGE BERNARD SHAW once said, “The single biggest problem in communication is the illusion that it has taken place.”

Generally speaking, architects, engineers, and scientists are confident that they can work on any project out there. They can get so wrapped up in their view of “the solution” that they seem incapable of taking a couple of steps back to define what that solution is and how to achieve it. The first roundtable project discussion is usually exhilarating, with a lot of energy bouncing around the room. The biggest challenge is how to encapsulate all that buzz and wrap it with a neat little bow into a proposal.

Once the project team comes back down from that initial “idea high,” marketers need to guide the process with the goal of achieving polished, easy-to-follow content that is relatable to the intended audience. Coming up with a solution is one thing; successfully explaining the benefits that the solution will bring is a completely different animal.

Sometimes, in the marketing world, you can feel like a broken record. It is up to marketers to consistently push practitioners in the right direction and pull the best content possible from them. Here are a few tips, tricks, and best practices to



effectively support the content development process.

1. **The Nagging Toddler.**

In the movie *Big*, Tom Hanks' character kept saying, “I don't get it,” while in a business meeting, thereby frustrating the presenter. The “a-ha” moment in that scene is understanding that he is speaking from the user vantage point while the businessman is unable to explain the “solution” to the intended audience. Try this at your next proposal meeting: Say, “I don't get it,” and have your pen ready to take notes.

2. **The Doodle.** According to the Social Science Research Network, 65 percent of people are visual learners. Architects and engineers love to draw, so ask them to do so while explaining their approach to a project. This has proven to be an effective tactic that leads to flow charts, renderings, and other visual elements that end up as part of the final submittal. If you want them to come alive, grab a marker and make edits or add elements to their drawings. They will probably forgive you after a week. (Fingers crossed!)

3. **The Dot-to-Dot.** A common mistake on proposal documents is not explaining why the content is applicable to the client and the project. The pieces are usually in the submittal, but just because it is obvious to you does not mean it is clear to the client. A neat trick that has garnered accolades from clients at debrief meetings is to include “Why is this relevant to you?” text boxes throughout the document, especially on the project examples section. Connect the dots for the evaluators and make it as easy as possible to read, understand, and rank your proposal.
4. **The View-Master.** The joy of watching those reels when you were a kid was undeniable.

If we dig deep into why that is the case, we will notice that those images jumped at us because we could extrapolate them into the movie or story they were from. The magic of the View-Master lies in its juxtaposition of micro and macro elements—frames versus the whole story. We tend to focus on the micro elements of the project we are pursuing and ignore the macro element of why the project is a reality. A look at the bigger picture is essential to frame your story in a concept that is relatable to all stakeholders. Remind them of why they are doing the project and how beneficial it is. (For example: Why is this aquifer maintenance program

happening? Maybe because the county population will benefit tremendously from a program that will improve the quality of its potable water supply.)

Be bold, be pushy, and behave like a 5-year-old. Do not give up until you understand the project, the solution, the approach, and your value proposition. Ask yourself this question: Can I walk out of this room and explain this to my significant other? If the answer is “no,” it’s time to say, “I don’t get it.” ●

Javier Suarez is a central marketing and sales support manager at Geosyntec Consultants Inc. in Boca Raton, Fla. He can be reached at + jsuarez@geosyntec.com.



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Business and Proposal Development in a Low-Resource Setting

THE CHALLENGES AND SOLUTIONS FOR DEVELOPING PROPOSALS WITH LIMITED RESOURCES

By Abbey Ogunwale

AFTER AN INFORMATION discussion or a sales visit with a client, submitting a proposal is the formal way of following up. A good proposal will introduce flexibility and a wide contract-winning strategy. Business and proposal development teams in elite firms are equipped with the necessary resources to create proposals that successfully market their company and open up valuable opportunities.

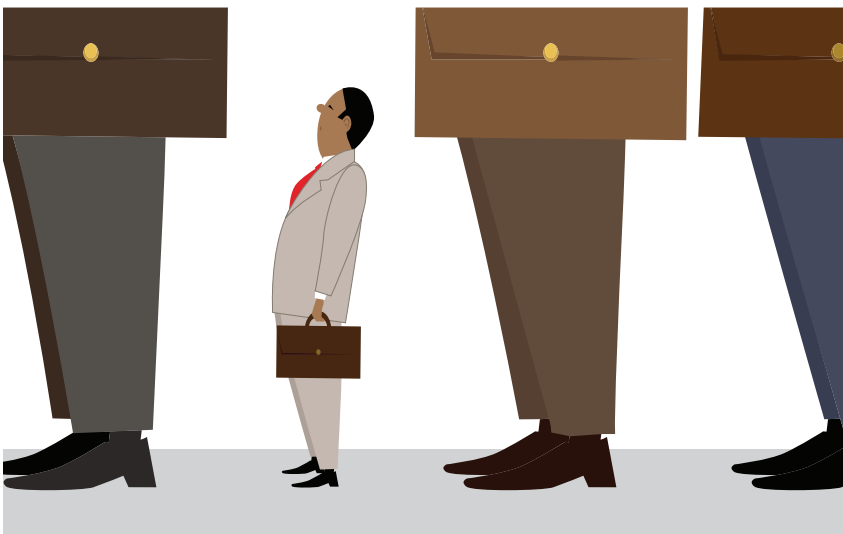
In reality, not all organizations have a fully staffed business and proposal development department to

work on proposals and bids. While there are some advantages to having a small, easy-to-control team for pursuing opportunities, the process of developing midsize to large proposals involves huge complexities, which means that such proposals are harder to tackle in a low-resource setting.

There are many reasons why this is true. The good news is that readily available proposal development tools and techniques make it possible for small teams to acquire a big-team win rate.

EXAMINING THE CHALLENGES

- **Slow and sporadic management.** It may come down to simply too many tasks to be accomplished by poorly managed teams. They often suffer from nonconstructive criticism and a lack of guidelines, which leads to inefficient task distribution and scheduling.
- **Difficulty in following best practices.** For example, a shortage of experience on the proposal team often leads to the inability to perform a quality review of proposals, serving to ensure compliance with the solicitation requirements. A quality proposal team must create a clear agenda from the onset, indicating who is responsible for what role in order to perform constructive reviews.
- **Indecision on bidding.** Without a fully functional proposal development team, it may be difficult to decide whether or not to bid in the first place. Necessary inputs that are needed to carry out a strategic bid decision may not be present, just as plans for





documenting lessons learned after the submission may not be a practice in this environment.

- **Limited expertise.** A low-resource setting doesn't always allow for the best set of experts to help write the bids. These teams have limited proposal development budget to pre-position for an upcoming opportunity or to gather intelligence before the release of a solicitation. Similarly, having a proposal writer with limited subject matter experience is not advisable, as it will hinder the ability of the team to explain the benefits of its services to clients.

HOW TO MAKE IT WORK

Engage in workshops and get certified. Low-resource companies should encourage their staff to participate in interactive workshops and acquire certifications—such as the APMP certification—that enhance proposal-writing skills through simulations and discussions. The tools and techniques learned will improve the development of proposals that cater to a client's problem and guide the client through the selection process. Team members will learn how to better analyze a client's needs and environment, utilizing proven methods to access competitive positions. Above all, this knowledge helps team members develop strategies that will improve win probability and manage clients' opportunities more effectively.

Use proven proposal development tools and strategies. There's a reason that people use tried-and-true methods: They help to create customer-focused proposals that sell. By discovering how to combine proposal and sales strategies, companies can enhance their overall proposal development and perform more efficiently despite their lack of resources.

Proposal developers face various challenges, especially in a low-resource setting. But those challenges can be offset by embracing and optimizing the use of the limited available resources to maximize win rate. ●

Abbey Ogunwale is director of business development at Project HOPE in Millwood, Va. He can be reached at + oabbey@gmail.com.

#SocialBidding in a Brave New World

USING THE POWER OF SOCIAL MEDIA TO EXPAND YOUR CONTACTS AND REACH MORE INFLUENCERS

By Darrell Woodward

IN THE 2010 film *Inception*, Leonardo DiCaprio's character reveals a fundamental truth about influencing people: "An idea is a virus. Resilient. Highly contagious. And even the smallest seed of an idea can grow."

As a proposal professional, your job is to persuade customers that your idea will bring the greatest reward for the least risk. The problem is that buyers are researching potential solutions and forming their own ideas long before you get to present your carefully crafted value propositions. Author and behavior-change therapist Douglas Van Praet calls this "unconscious branding"—the way people's minds process information and form the unconscious beliefs that motivate decision-making.

BRANDING, BELIEF, AND BIAS

If buyers form their ideas around someone else's solution, your competitor will benefit from the effect of confirmation bias, which is the tendency to view information in a way that confirms one's beliefs. No matter how good your proposal, it will create cognitive dissonance in the mind of buyers because it conflicts with their unconscious branding. Leon Festinger's cognitive dissonance theory suggests that people tend to seek consistency with their attitudes

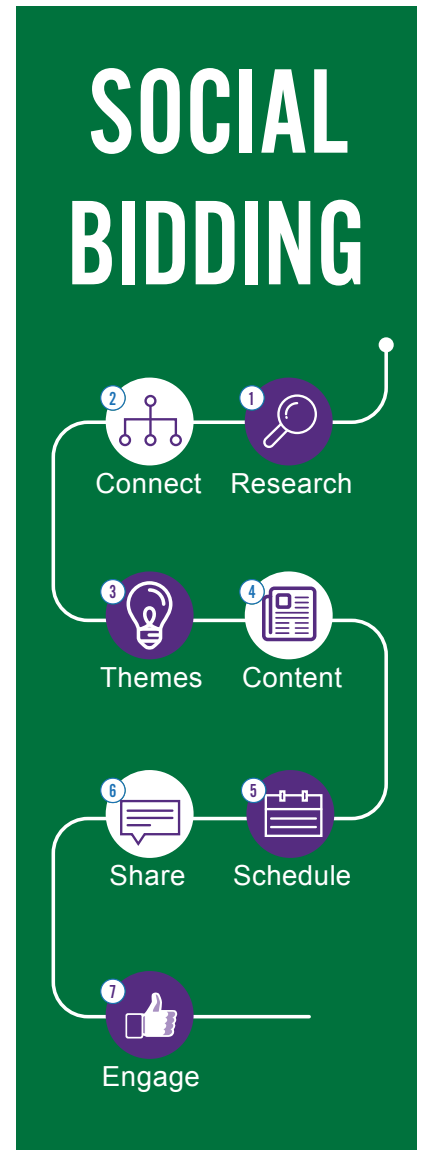
and beliefs in order to avoid internal disharmony (or dissonance).

In other words: Your competitor's proposal will confirm the reader's existing beliefs and score higher, while yours will never quite match up to expectations. Influencing directly can be difficult, as most tender processes restrict dialogue with the client, except through a designated contact at limited times. You need an alternative route through which you can plant the seed of an idea, nurture the belief, and turn confirmation bias in your favor.

SOCIALIZE YOUR STORY

Research from International Data Corp. shows that 75 percent of B2B buyers and eight out of 10 executive buyers use social media to assist with purchasing decisions. Social bidding uses the power of social media to widen and deepen your contacts, enabling you to reach as many influencers as possible. Using a programmatic approach, you can research your target audience, develop a library of content, schedule persistent messaging, and engage with buyers' social conversations. All the while, you are building the story you want to tell in your proposal.

To be effective and build credibility, you need to lead with generosity by sharing relevant



information. Selflessly sharing insights from third-party reports, surveys, and trade magazines shows buyers you understand their business and the problems they face. There is plenty of content out there. For example, according to Technorati's "State of the Blogosphere," the *Washington Post* produces 1,200 articles per day, in addition to publishing more than 3 million new blog posts daily.

With so much content out there, you don't want to share blindly and randomly. Instead, you need to attract your target audience's attention by calling out something relevant and recognizable to them. A fact or quote from the article mixed with some of a customer's own themes works well. Next, you want to build

and reinforce your story by creating a link between the content you share and the idea you want to implant. Finally, you want to make buyers think about the implications for themselves or their business. A probing, hypothetical question works well. Remember, you are leading them to their own conclusions; if they think you're pitching, they will disregard your message.

Having established your authority, you can engage with your client's social media activity (both the company's and your contacts'), websites, blogs, and news articles. *The Sophisticated Marketer's Guide to LinkedIn* says that 50 percent of members are more likely to purchase from people who engage. So, go ahead and like, share, and retweet,

because customers will appreciate your attention, and it keeps your brand high in their awareness. Just don't overdo it, or you risk crossing the line into creepiness!

Informed buyers are making decisions before the RFP. Use social bidding to begin the persuasion process early so they believe your solution was their idea in the first place. Your proposal will resonate with the same pervasive message, leading to a more positive evaluation. ●

Darrell Woodward is an APMP-Practitioner™ Level bid manager and a director at Prosfora Solutions Ltd., where he focuses on how social media, proposal automation, and storytelling can win more business. He can be reached at + darrell_woodward@hotmail.com.

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How to Make an Infographic Go Viral in 5 Steps

By Mike Parkinson, CPP APMP Fellow, Microsoft MVP

A **KEY PART** of business development is marketing, and an effective marketing strategy is to produce viral content. Viral content is defined as any piece of information that is circulated rapidly and widely from one internet user to another.

Infographics are a popular way that internet users share ideas and solutions because they quickly tell a succinct, helpful story. Making an infographic is relatively easy; making it go viral is the hard part. The following is a way to do it:

1. Start with a popular topic (i.e. in the news, trending on social media). If your subject is not highly sought after, find a way to connect it with one that is. For example, if your subject is file-sharing technology, you could link it with keeping information safe from hackers, such as “Stop Hackers with Safe File-Sharing Solutions.”
2. Choose a provocative title that mentions the hot topic. This is your headline. It should give people a reason to care about your infographic. They must quickly know the benefit(s) to reading it. If there is no benefit, why would they want to share it? (The benefit can be implicit or explicit, but I recommend the latter.) Sharing a specified number of tips, tricks, or secrets is a popular approach to get more “likes” and “shares.”

Here are a few examples:

- 3 Ways to Make Your Executive Summary Better
 - 20 Websites for Free PowerPoint Graphics
 - 5 Ways to Win Proposals in the Trump Administration
3. Find facts or instructions that support your title/headline. Break the information into bite-size, digestible chunks and arrange them to tell a story.
 4. Render the infographic. Use your favorite graphics software or an online infographic tool, such as the following:
 - piktochart.com
 - canva.com
 - infogr.am
 5. Post your infographic everywhere you can. Include “share” buttons wherever possible. Remember to include hashtags on social media that highlight the subject matter and benefits. Tag organizations and individuals that align with your subject matter. For example, if your infographic favorably mentions a company, tweet it with the company’s handle (e.g. @powerpoint, @apple, @urbanoutfitters) to increase your chances of a retweet.

Consider contacting online news websites and asking them if they would like to share your infographic. Free content in a popular format is always appealing to news outlets.



If your subject is not highly sought after, find a way to connect it with one that is. For example, if your subject is file-sharing technology, you could link it to keeping information safe from hackers by using a headline such as, “Stop Hackers with Safe File-Sharing Solutions.”



To help you pick the right graphic type, use this “Graphic Cheat Sheet”: billiondollargraphics.com/GCS.pdf



Take a look at Piktochart's "20 Websites You Should Leverage to Promote Your Infographic": piktochart.com/blog/websites-submit-promote-your-infographic

This infographic (Figure 1) makes it easier to choose healthy breakfast options. It gives the reader a reason to care and share it with others who may have a similar challenge. Do the same for your topic and target audience to generate awareness, be seen as a thought leader, and improve the likelihood that you will win your next proposal.

Experience is the best teacher. Over time, expect to get better and better results the more you apply what you learn. ●

Mike Parkinson, CPP APMP Fellow and Microsoft MVP, is an internationally recognized visual communications, solutioning, and proposal expert. He is a partner at 24 Hour Company and author of *Billion Dollar Graphics*. He can be reached at + mike@24hrco.com or 703-533-7209.

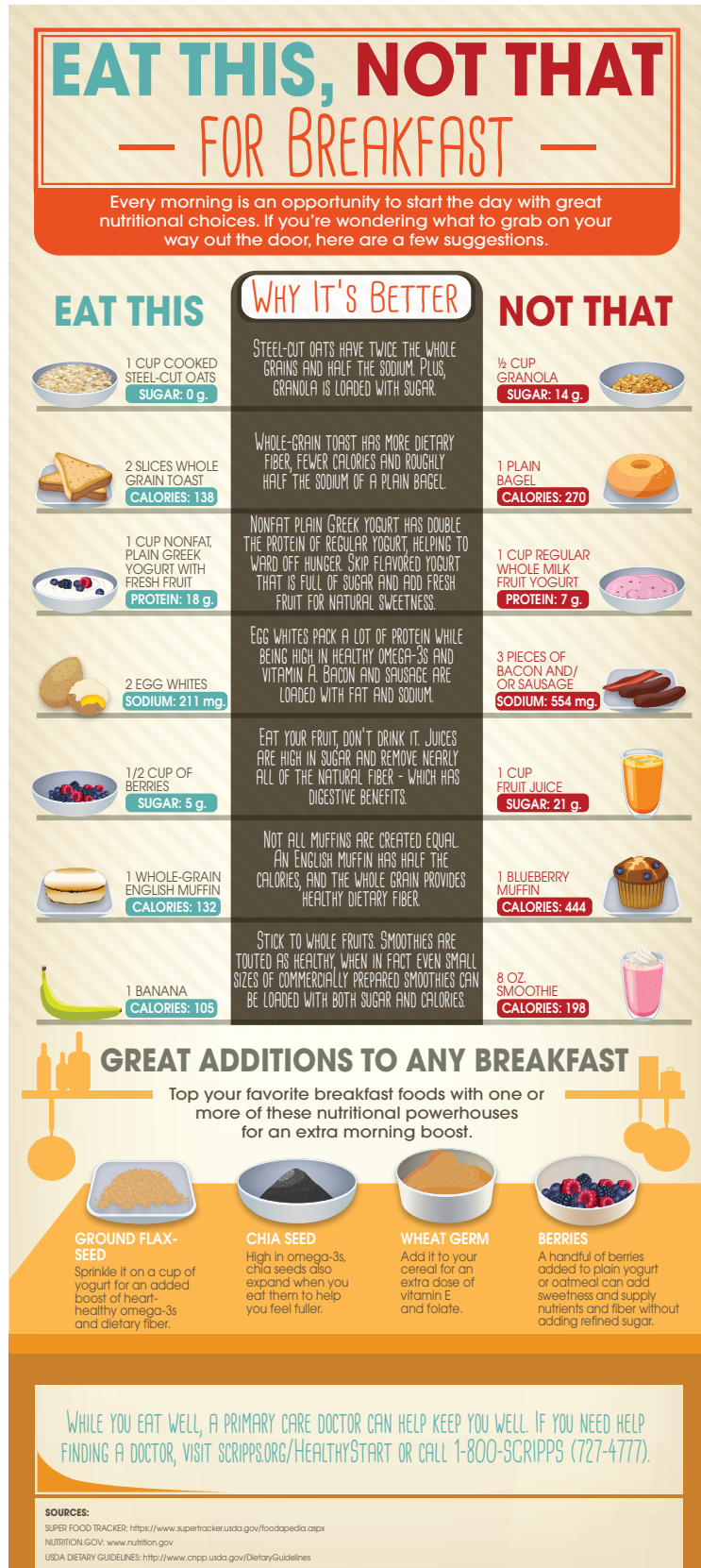


Figure 1: This is an example of a viral infographic.

Using G Suite to Better Manage Proposals

By Delafriya Dorabjee



AS SOCIETY BECOMES more connected, there is a greater need for collaboration and mobile ways of working. Connectivity in the workplace has become a prerequisite no matter which industry you may be serving.

Most of you are used to working in an environment where you hold the master documents. You spend your 9-to-5 in meetings, chasing responses, writing portions you're responsible for—and then the real work begins after hours. At 5 p.m., various technical writers give you their tracked changes. You spend countless hours merging changes from various documents, making sure to get out another version at night so the team can pick up a clean version in the morning and start the process all over again.

Well, here's a thought: What if you could skip the entire merging process? You can, using G Suite. Its online collaboration capabilities are unparalleled. As with anything new, there is a learning curve—switching from Word, PowerPoint, and Excel to Docs, Slides, and Sheets, respectively—but it's definitely worth it in the sheer number of hours you'll save merging documents at night. With G Suite, everyone can be in a document simultaneously, watch changes being made in real time, and edit those

changes as well. There's no more waiting to click "Save" and being locked out of sections because someone else is making edits there, as you may be used to in SharePoint.

The great thing about G Suite is the level of control you can give to the document writers. People can have Editing, Suggesting, or Viewing level of access. With Suggesting mode, you can track changes like you normally would in Word but with the added feature of controlling who's accepting and rejecting changes, as well as being able to see it all play back in the revision history.

In August 2017, Google Docs got a major upgrade that can better track changes—a feature anyone managing a document with more than two authors can appreciate. You can now easily accept or reject all changes at once, and you can name revisions in order to better track your progress within each document.

Another great tool to keep on top of proposals and team members is an effective proposal management plan—built in Google Sheets, of course. This extensive document is ideal with large teams. You can use this document to manage the schedule; build responsibility matrices; assign action items and escalate risk registers; collect resources, references, and case studies; brainstorm

for win themes; and more. Using Sheets, you can do everything you could in Excel, such as create drop-down lists, assign conditional formatting, and build schedules. When managed the traditional way, team members may look at this proposal management plan only during regular cadence calls, and half the meeting time could be used to go through every line item to update team members' progress. Now, in Sheets, the team members are empowered to update their assigned tasks—when-ever they have a update—under the responsibility matrix and action item lists. This can reduce cadence call times significantly, saving everyone's vital time.

The best way to take advantage of G Suite is to use all the various apps, tools, and extensions it has to offer. From Google Mail, Drive, Keep, and Drawing to Forms, Sites, Maps, and Hangouts, the integration knows no bounds. The more tools you use, the better features you can unlock to more effectively manage your proposals and team members. ●

Delafriya Dorabjee is a proposal manager for PwC (PricewaterhouseCoopers LLP). She can be reached at + delafriya@gmail.com.

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Business Sector



One Sector for All

APMP'S NEW BUSINESS SECTOR REPRESENTS PROPOSAL PROFESSIONALS ACROSS A SEA OF INDUSTRIES

By Jody Alves

Accounting, agriculture, education, energy, engineering, insurance, manufacturing, technology, security, and technology. What do they have in common?

They are just some of the many business types or industries in which proposal professionals ply their trade. And they are exactly the professionals that APMP had in mind when rebranding its former commercial community into the business sector.

The mission of APMP's business sector is to support the work and careers of proposal professionals across the B2B, B2C, public sector, and other nonfederal landscapes, harnessing member knowledge, data, resources, and talent, and making it accessible and actionable for professional development and success.

The business sector's action plan centers around four core initiatives:

- **Engage** professionals across business segments, beginning by re-engaging members of APMP's former commercial community, growing membership through recruitment initiatives, and stimulating active participation from members.
- **Educate** members through professional certification and a schedule of targeted programming and provide access to a toolkit of new and repurposed content that is unique to the business sector.
- **Encourage** networking and collaboration among members, connecting people, projects, and progress by offering regional and international events and establishing regular communications with the sector.
- **Evolve** professional enlightenment with conversations that question assumptions, continually track and understand similarities and differences in proposal industry roles, stay up to date on trends within and outside of the proposal industry, and incorporate fun and creativity.

FIRST THINGS FIRST

After defining the mission and action plan initiatives, the business sector leadership team, chaired by Jamie Ninneman, senior director of global operations at SAP America Inc. and the incoming APMP chair, planned and implemented two important steps: a business sector kick-off and a member survey.

A 'WE MEAN BUSINESS!' KICK-OFF

Lately, some town hall meetings across the country have been politically charged. In the case of the recent town hall kick-off for APMP's business sector, people were simply charged up!

More than 70 proposal professionals, representing a wide variety of industries, attended the "We Mean Business!" Town Hall, held at Bid & Proposal Con in New Orleans, Louisiana. The purpose of the town hall was to introduce the newly rebranded business sector and its leadership team, to identify topics of interest to members, and to begin a dialogue. Our team came prepared with a list of 13 topics in which members have shown interest over the past few years. It took no time at all for attendees to tell us what they wanted to talk about:

- Project manager role out of scope
- Bid/no-bid decisions
- International perspective
- Building a new team
- Capture and pre-proposal work
- Business vs. federal rules
- Sense of coherence (SOC) questionnaires
- Outsourcing and offshoring
- Client references: ownership
- Commissions
- Proposal volume strategy
- Proposal vs. the SME

FIRST CURIOSITY, THEN COMMITMENT

Town hall attendees came with curiosity, actively engaged in the conversation, and left fully committed



Photo courtesy of Jody Alves

to what the business sector can offer. Afterward, more than 82 percent of those who completed the session survey rated the business sector town hall as "strong" or "very strong." Comments that accompanied the scores included the following:

- "Much needed ..."
- "So good; please do this again."
- "Like this concept ... hope to see it grow."
- "... a lot of people were trying to help each other."
- "Make it longer ... discussions had to be cut off, and this was a good one."

APMP recognizes that not all town hall attendees may have found the discussions relevant to their work. Please stay tuned, as there is much more to come.

MEMBERS' WORDS, APMP'S ACTIONS

More than 700 APMP members responded to the business sector survey, launched the day after the town hall meeting. The responses clearly revealed consistency of need. APMP is now working to create a road map of specific action items. The following are a few examples of what members have requested:

- **Education:** Benchmarking data, an interactive discussion on transitioning information

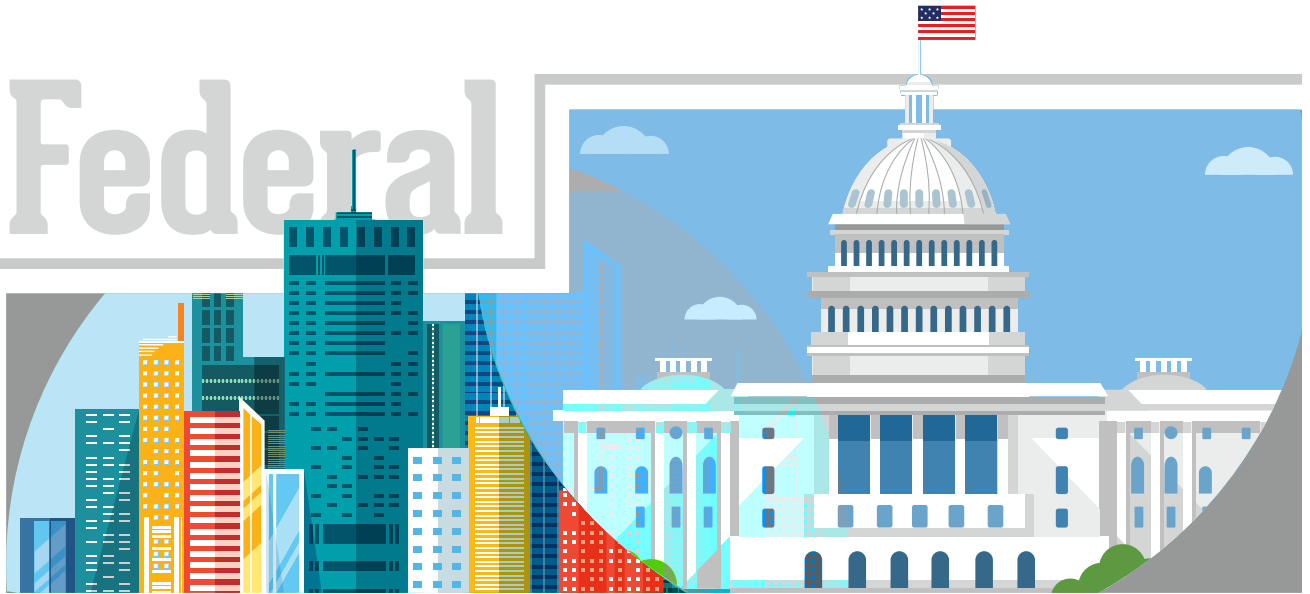
from sales to proposal professionals, expansion of business sector priorities within the APMP Body of Knowledge, and session suggestions for Bid & Proposal Con 2018.

- **Best Practices:** Discussion and development of resources for the proposal process, operations, and business development—starting with suggestions for small departments with short turn-around times—and why those approaches work.
- **Next Generation/Future of the Industry:** Webinars, articles, and podcasts on priority topics, such as building a proposal career, managing multiple functions, and developing business cases that evaluate investments in proposal tools and resources.

Interested in more info? Check out the new business sector hub under the "Communities" tab at APMP.org, or visit the APMP LinkedIn page at [linkedin.com/company/apmp](https://www.linkedin.com/company/apmp). ●

Jody Alves is a senior proposal writing specialist at IGT in Providence, R.I., and a member of the business sector leadership team. She can be reached at [+ jody.alves@igt.com](mailto:jody.alves@igt.com).

Federal



Aligning Business and Government Acquisition Processes to Improve Win Probability

PREPARE TO WIN ON THE BUSINESS DEVELOPMENT BATTLEFIELD BY UNDERSTANDING THE ORGANIZATIONAL TERRAIN AND TIMING

By Mitch Reed, CPP APMP

To improve an organization's overall proposal-win probability, business development and proposal professionals need to understand the government's procurement process, how it aligns with industries' business acquisition processes, and the steps professionals perform during each phase to prepare to win. This understanding is paramount to the creation of a sound business development strategy that can be translated into an executable capture program that leads to a proposed solution targeted to a customer's mission requirements:

- **Mission Requirements:** Identify critical technical and schedule requirements and other conditions driving the customer's procurement request.
- **Knowledge of Products and Services:** Inform customer of products or services available and how they meet the customer's technical and schedule requirements.

- **Trust of Company and Performance Ability:** Inform customer of company's past successes solving similar customer mission requirements.

Understanding the government procurement process is critical for another reason: The end users that have the mission requirements do not directly conduct the purchasing. Purchasing is accomplished through a separate government contracting agency or an interagency-designated contracting office. In other words,

the procuring agency that awards and manages the contract is most often NOT the end customer for the products or services procured. While most proposal professionals understand this, few take the procurement organizational structure or special conditions of the purchasing office into account when planning business development efforts.

Program opportunities begin long before contracting agencies become involved, offering contractors the opportunity to work with program managers and help guide the foundational requirements, budgets, and potential contract vehicles to maximize the program's success. A clear understanding of the key aspects of the procurement process and its alignment to the acquisition process offers your company the ability to better impact the following:

1. **Present mission requirement solutions to issues that directly influence Statement of Work (SOW) or Performance Work Statement (PWS)**

development. Much of this effort occurs prior to the program management offices engaging the contracting agency. This offers contractors a valuable opportunity to help customers more clearly identify potential solutions to meet mission requirements and support the next critical area: budget.

2. **Develop a realistic budget based on mission requirements to execute the SOW/PWS.** With better defined SOWs/PWSs, companies can help program managers establish realistic budgets and explore options to meet the program's financial constraints and maximize program value.
3. **Identify other potential contracting agencies/contract vehicles that are more advantageous to procure, manage, and execute the awarded contract.** Keep in mind that government contracting agencies charge customers a percentage of their program funds to manage contracts and

IT IS YOUR COMPANY'S EARLY INVOLVEMENT AS A TRUSTED PARTNER THAT PROVIDES BOTH THE PROGRAM OFFICE AND THE CONTRACTING AGENCY THE CONFIDENCE THAT YOUR COMPANY WILL DELIVER.

cover their operations costs. Agency program offices can often leverage other contracting agencies and contracting vehicles to maximize program funds and better control program execution.

When the program office engages the contracting office, it continues to be involved throughout all the phases of the procurement process. It is your company's early involvement as a trusted partner that provides both the program office and the

Who Influenced Your Customers?

When receiving an RFP, the first question that needs to be asked is, "Who helped the government develop the solicitation requirements?"

Too often, this is the only question asked, ignoring two additional but highly critical questions: "Who helped them plan their initial budget independent from the contracting agency?" and "What other contracting agencies may be more advantageous to manage the procurement process?"

Directly or indirectly, you or your competitor influenced the RFP development, budget, and contract vehicle, therefore influencing the contracting agency. A detailed reading of the SOW/PWS often makes this clear based on the products or services used to define the requirements. Your business development team's goal is to always ensure your company was the most highly influential on the final RFP, thus significantly increasing win probability.

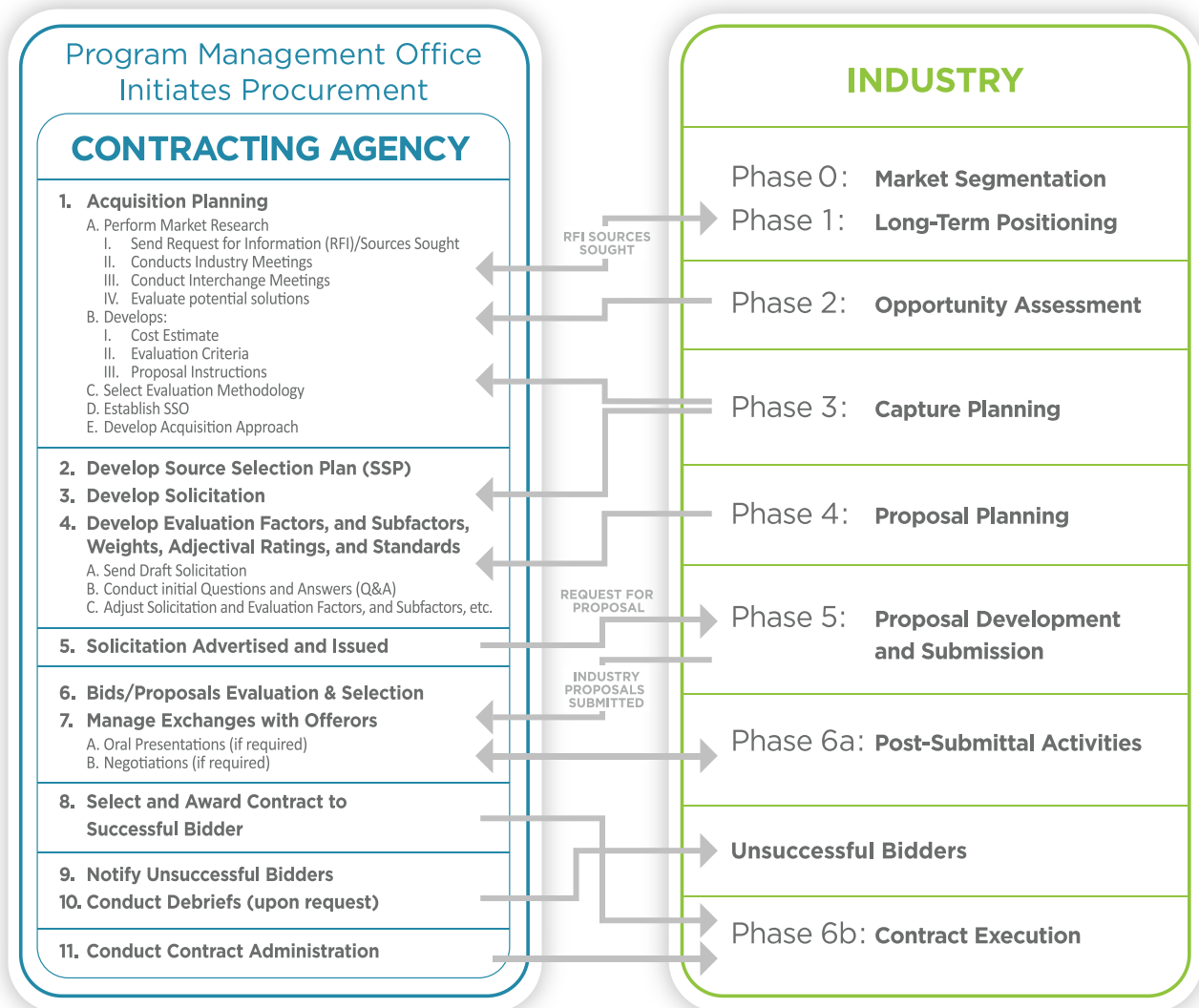


Figure 1: High-Level Federal Government Procurement Process

contracting agency the confidence that your company will deliver.

How should this understanding impact business development and proposal planning when pursuing government business? As shown in Figure 1, the procurement process offers multiple opportunities for contractors to work directly with the program offices and contracting agencies.

This ensures mission requirements are met at the greatest value to the government, while still allowing contractors to prosper. This is accomplished through:

1. Internal corporate planning and coordination by sales

professionals that aligns efforts at each level of the government procurement and business acquisition processes

2. Interfacing with key program and contract personnel to directly influence the overall program, to ensure its success and the success of the winning contractor

In conclusion, the first step of the government procurement process—acquisition planning—is specifically designed for this purpose. Leveraging key opportunities to work with the program office and the contract agency, ethically and

consistently, will increase your winning potential. ●

Mitch Reed, CPP APMP, is director of sales operations at Envistacom LLC, an Atlanta-based technology company. He can be reached at + mreed@envistacom.com.

Sources: U.S. Department of Defense, Office of Small Business Programs, *Government Contracting: The Basics*, October 2012; U.S. Army, *Army Source Selection Manual*, Feb. 26, 2009; Mary Ann Anelli, *Shipleys Capture Guide: Winning Strategic Business*, 2008.

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CONTENT UPDATES

COMPLETED RESPONSES

WIN/LOSS

Data That *Drives*



LEVERAGING PROPOSAL ANALYTICS TO PROPEL BUSINESS VALUE

By Lewie Miller

Businesses, people, and connected devices create a staggering amount of data every day. Companies are racing to implement technology that can glean insights from this data and put those insights to work in their businesses. Proposal teams in particular have a substantial opportunity to use analytics to refine and inform nearly every aspect of the RFP and proposal creation process—and ultimately to help close more deals, in a more efficient way.

When companies use proposal automation software, they also collect data that has the power to shed new light on the proposal creation process and its outcome. Time spent on proposals, win/loss rates, frequency of content updates, and other levers are all valuable metrics that can be fed back into the process, educating sales and proposal teams on which prospects they have the best shot at converting. At the same time, it is easy for proposal teams to get bogged down focusing on the operational data points, such as how long a proposal took or the overall win rate. While these metrics are insightful, proposal teams should take a step back and work to pinpoint which metrics really matter from a strategic standpoint. It's important to understand which data insights can be used to inform strategic and revenue-generating initiatives. This is one area where proposal teams can provide value within their companies.

WHEN COMPANIES USE PROPOSAL AUTOMATION SOFTWARE, THEY ALSO COLLECT DATA THAT HAS THE POWER TO SHED NEW LIGHT ON THE PROPOSAL CREATION PROCESS AND ITS OUTCOME.

CURRENTLY TAPPED DATA INSIGHTS

According to a recent survey commissioned by Qvidian, 88 percent of respondents—which included proposal and RFP writers as well as sales operations and enablement professionals from large companies—use data insights from their proposal automation software to inform their internal processes and strategies.

Respondents reported using data analytics in the following ways:

- **65 percent** consider win/loss data from previous efforts most of the time when determining whether or not to bid on a specific RFP; only 10 percent of respondents never do.
- **62 percent** are using—and finding value in—tracking the time it takes to create proposals and RFPs.
- **56 percent** are tracking the number of completed responses within the RFPs and proposals.

However, many teams aren't fully taking advantage of the breadth of data insights their platforms could deliver. The following are ways that proposal teams can use data insights not only to shape their RFPs and proposals, but also to inform strategic decisions across departments.

THE POWER OF SELECTIVE BIDDING

With more and more RFPs coming across their desks, proposal teams are stretched thin. Team members are expected to complete proposals faster than ever before—and at any cost. This shows no sign of slowing down; in fact, 30 percent of respondents from the same survey feel that the proposal turnaround time has tightened since 2016.

For smaller companies hoping to grow quickly, failing to bid on a RFP is sometimes not an option. However, some organizations don't realize that it's not worthwhile or cost-effective to respond to all proposals. In some cases, completing an RFP can actually cost more money than the organization would generate if it ultimately won the business. More obviously, completing an RFP requires many different resources within an organization. Being selective and targeting those prospects that offer a high chance of winning and will also be profitable customers is a smarter strategy. Companies no longer need to rely on a gut feeling to decide which RFPs to answer.

Teams can use past intelligence to predict likely outcomes in competitive situations. For example, before beginning the bid process, proposal teams can take a look at historical data around RFPs and proposals that were developed, and then determine the win rates for similar proposals. By incorporating data from customer relationship management (CRM) systems that point to the outcome of previous proposals, teams have the opportunity to make an educated decision on whether or

not the prospect is worth pursuing. Some factors to consider include who the key stakeholders were (i.e. company size, industry, etc.), what the deal characteristics were, and what content the team used to respond to the RFP.

If history points to a lost deal, it probably makes sense to save internal resources to pursue opportunities that are more prone to pan out.

BUILDING AND INSPIRING A 'DREAM TEAM'

In many cases, proposal team makeup is a critical part of the deal response strategy. Data analytics can be used to determine which teams and individuals have a winning record so that strong people can be assigned to important pitches. There is also an opportunity to analyze individual team member expertise and understand who is historically stronger with different types of proposals for various industries, products, and services, allowing team makeup to be even more strategic and thoughtful.

Analytics can be used to track team member performance, helping managers identify star performers and those who need extra attention and support. Within their proposal automation software, managers can drill down into metrics such as how often individuals refresh content (content is typically updated by subject matter experts, or SMEs), productivity in terms of volume of contributions to proposals, adherence to deadlines, and ability to collaborate efficiently with SMEs.

Perhaps an individual has a strong track record in developing winning content for a particular line of business. This is something a manager would want to recognize and encourage. On the flip side, not keeping content up to date can derail the quality of a proposal, making it vital to pinpoint the culprits.

IDENTIFYING CORE AND WINNING CONTENT

By automating the RFP and proposal process, ideally, writers are freed up to spend more time on creating quality, message-rich, and up-to-date content. There is an opportunity to take this a step further and use data analytics to identify content that will resonate most with the prospect and increase chances the deal will be won. Analytics can help determine which content is used the most and which content is not used at all, helping proposal teams and SMEs to create a relevant and up-to-date content library. Proposal writers can examine which content was most frequently used in winning proposals, such as various iterations of product or service differentiation statements. Writers can discover whether case study information is a key ingredient of winning proposals and how much custom content is typically required.

One large company, a leader in the financial technology space, used analytics to pinpoint which content

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was most valuable to the organization and therefore warranted regular review. The company had collected content over the years, thinking more content would provide more value. The company was not curating the content, however, deciding which was most useful and successful in proposals. Often, it had multiple content elements for the same topic. By running analytics reports, the company was able to determine which content records were used by proposal managers and how many times. The results were telling. Out of a library of 96,000 records, 53,000 records created more than a year prior had never been used. Unfortunately, the company had just completed a focused effort to maintain those never-used records.

Running more analytics, the company discovered that only 4,000 of its records had been used more than five times. This was its core content. By focusing on this content, the company was able to reduce the content management workload by more than 90 percent, improving quality and efficiency.

CREATING A CROSS-DEPARTMENT FEEDBACK LOOP

Data analytics also empowers proposal teams to work across departments. They can loop in colleagues in sales and marketing by providing them with information on which messages are—and are not—resonating with audiences in different geographic locations and industries. Proposal teams can engage sales teams in data insights, giving them visibility into winning content, as well as proactively discussing which messages resonated most during conversations with a prospect.

When marketing has a hand in ensuring RFP and proposal content is strong, analytics can allow teams to focus their resources on making the most-used key pieces of content shine.

“There is a great deal of power in data points that are seemingly so simple, such as the usage of a ‘record,’ also known as an individual piece of content in the library,” said Leif Ueland, director of sales operations for Questar Assessment Inc., a K–12 assessment solutions provider focused on building a bridge between learning and accountability. “I worked for a large health care company where we had over 10,000 records in our proposal content library, but there was a very small group of core records (less than a dozen) that were consistently used hundreds of times per year. This was a data point that was very interesting to the marketing department and the sort of information that can motivate a marketing team to commit resources to make sure the necessary work happens to ensure the text and graphics in those outlier FAQs really is exceptional.”

Going beyond sales and marketing, ideally proposal-related data can also be fed back to product management and development. For instance, product teams could look at RFPs to determine gaps between current offerings and those inquired about by the prospects in order to shape future product road maps.

WHEN MARKETING HAS A HAND IN ENSURING RFP AND PROPOSAL CONTENT IS STRONG, ANALYTICS CAN ALLOW TEAMS TO FOCUS THEIR RESOURCES ON MAKING THE MOST-USED KEY PIECES OF CONTENT SHINE.

THE FUTURE OF DATA INSIGHTS

Machine learning, where software becomes more intelligent over time and helps the user predict outcomes based on historical data, has already started to significantly enhance the capabilities of proposal automation software. As software becomes more advanced, it will help teams be more strategic and proactive in their prospect outreach, marketing, and lead-generation activities. Users could look at RFP data in aggregate to understand patterns and trends in the questions being asked by the companies that send the RFPs and develop outbound marketing campaigns to promote their capabilities in these areas.

Measuring the true cost of an RFP response is not an exact science today. Proposal automation software will soon make this easier, taking into account aspects of the process like the number of contributors and questions and the amount of time spent on the document, to offer a more concrete dollar amount.

Ultimately, smart use of data analytics doesn't involve just looking backward. Rather, it entails use of historical instances to look forward and select not just an RFP or a proposal strategy but also the individuals involved in its creation. Proposal teams who do so are truly elevating the task to be a strategic, revenue-generating function—proving themselves indispensable to their businesses. ●

Lewie Miller is president and CEO of Qvidian, a provider of cloud-based RFP and proposal automation software. He has more than 30 years of sales and marketing experience, as well as operating executive expertise.



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Going
It

ALONE

AVOIDING PITFALLS AS A ONE-PERSON
PROPOSAL DEPARTMENT

By Michael Doyle, CF APMP

Proposal editor. Proposal coordinator. Production manager. If you are a lone proposal guru, these resources can sound as mythical as a sphinx or the Nemean lion. Whether working for yourself or as the sole proposal professional in a small to midsize organization, you must wear a lot of hats to build a compliant and responsive proposal. While a formal bid/no-bid gate decision should be a fundamental process step no matter the setting, as an independent consultant, you must also be prepared to enact your own opportunity assessment when contemplating a project—or else suffer the risk of some costly pitfalls.

ASSESSING OPPORTUNITY

Every independent proposal consultant has been there at one time or another. Maybe you're new to the scene and eager to get that first win under your belt, or maybe a prospective client calls you with an RFP in the pipeline that sounds just a bit too good to be true. Whatever the case, it can be hard to say no when a lucrative opportunity comes along. While it may be tempting to just sign on the dotted line, the reality is that the hidden costs of taking on a lost cause can far outweigh any commission. Reputations in our industry are not built on the volume of bids built—but on the outcome of those bids.

Moreover, by agreeing to manage a bid, you're asking prospective clients to place the financial success of their business in your hands—a responsibility that should never be taken lightly. While a seasoned professional may possess the alchemic wherewithal to transmute lead into gold, a no-win situation is still a no-win situation. Before you take the leap, consider asking the following questions to ensure that prospective clients have what it takes to make it to the finalist stage:

1. Have you ever submitted a proposal response?
2. Do you currently have a knowledge management system in place?
3. Have you read through the RFX to verify that your organization can meet every requirement?
4. Do you possess the certifications, registrations, etc., required by the issuer to submit a bid?
5. Are you confident that you can price your products and/or services competitively?

While a “no” response to any of the above qualifiers is not necessarily a deal breaker, each should trigger a red flag. You may find that the client simply needs a bit of extra guidance during the bid/no-bid stage or stewardship through the proposal development cycle. On the other hand, you may realize that it's in the best interest of both parties to walk away—a realization best made long before committing to the project.



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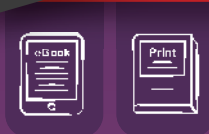
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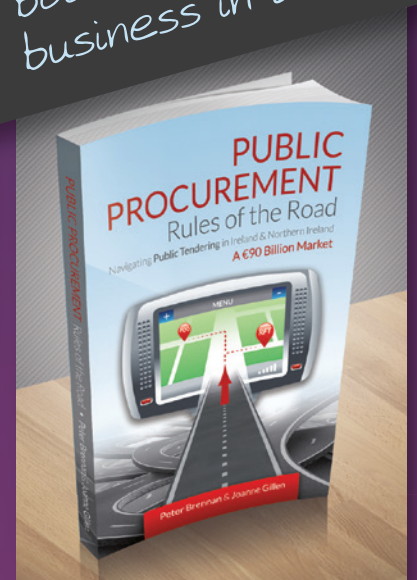
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LINES IN THE SAND

Once you're confident that the prospective client can qualify to receive a reward, the next step is to set the scope of your involvement in the process—that is, the number of hats you'll be wearing. Will you be managing the process in its entirety, from letter of intent to final submission? Crafting new content from scratch? Creating the graphics and images necessary to illustrate data? Are there steps that you will not be involved in, such as calculating pricing? Hammering out these details early on is imperative to avoid any confusion that eats away at invaluable time. Consider the following:

- Clearly detail the project schedules, responsibilities, and deliverables of each party.
- Dictate that your client designates a project lead who will be responsible for gathering information from SMEs within the organization.
- Require at least 50 percent of the project's total fee upfront, to ensure client buy-in.
- Establish secondary contacts who you can reach out to if your contact is unresponsive—especially important if working off-site.

Setting the ground rules early on will go a long way toward preparing the stage for a successful development process.

SOLO BUT NOT ALONE

Signing up to build a contract-winning proposal response for a new client is a lot like agreeing to win employee of the month on the first day at a new job. Impossible? Not at all—but you need to be prepared to hit the ground running. By ensuring that the client is well-positioned to qualify for an award and establishing clear boundaries at the forefront of the engagement, half the battle is already won.

Lastly, even when flying solo, there's help right around the corner that should not be overlooked. The *APMP Body of Knowledge* is one such resource that is chock-full of invaluable advice that can be tailored to suit the needs of organizations big and small. Likewise, leveraging APMP's *Consultants Directory* is an excellent way to build a network of like-minded, certified professionals that can be called upon in a pinch.

Now, go win some business! ●

Michael Doyle is a senior proposal manager at 4Front Advisors, a consulting firm headquartered in Phoenix, Ariz., and an independent consultant offering proposal management services. He can be reached at + doylewrites@gmail.com.





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IMPRESSIONS

Everything I Know About Proposal Management I Learned from 'Game of Thrones'

By Morgan Barker

GAME OF THRONES—it's the premier show for political intrigue, unnecessary bloodshed, and dragons. From late spring through early summer, I relish the Sunday nights spent watching the Starks, Lannisters, and Targaryens vie for the Iron Throne as an army of the dead marches south. My evenings spent in Westeros frequently bleed into my daily life. Beyond freaking out about the Red Wedding over coffee, I often find myself wondering: What might my heroes do in daily life? I've found that some lessons from *Game of Thrones* can be applied to proposal management:

Act like Littlefinger in the startup and planning phase. Littlefinger believes the only way to survive and be successful in Westeros is by planning for every possibility. Anything that can happen will happen, and one must plan accordingly. Likewise, the only way I know to be successful in proposals is by extensive planning.

Time is of the essence. In *Game of Thrones*, winter is coming: It is a fixed point looming in the future that none of the characters can escape. For a proposal manager, deadlines are inexorable. It's important to proactively manage the schedule and plan for the impending storm.

Define roles, responsibilities, and expectations early. This process is like trying to figure out who's seated on the Iron Throne. It's challenging, but it is an integral part of setting up the proposal for success.



Seek out and accept criticism. In *Game of Thrones*, it's clear that the strongest leaders are those who ask others what they think. For proposals, it's vital to hold review sessions and listen to the team. My opinion is not the only one that matters.

Play by the rules. In Westeros, characters who break the rules may prosper, but that prosperity is always short-lived. The Red Wedding may have put the Lannisters on top briefly, but they pay dearly for it. A proposal must always follow rules (be compliant) in order to win the battle.

Be the kind of leader who inspires; don't rule by fear. It is my job to keep the team happy and on task and to lead them to success. I believe the best way to do this is to roll up my sleeves and chip in, recognize and thank team members who push the team toward the gold, and feed people when they get grumpy. I aspire to be a Stark, not a Lannister.

Reflect at the end of the process. Like Jon Snow, I assume I know nothing and lead my team through a lesson learned. This is a humbling experience and allows us to plan for future proposals.

Remember: A well-told story sticks with you. If I can overcome the many challenges obstructing my proposal and tell the right story—the kind of story that makes the reader lie awake at night pondering themes and encourages others to explore my world—then I will successfully win over my customer. ●

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