journal

VOLUME III NUMBER II // 2015

APMP

Your Professional Guide to Winning Business

+

THE HYBRID APPROACH

Situational Strategies for Proposal Development

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In Every Issue

FROM APMP'S
EXECUTIVE DIRECTOR

EDUCATION AND CERTIFICATION MAKE A DIFFERENCE

How do you prioritize your professional development and continuing education? Regularly like a haircut or an oil change, or is it an afterthought that gets bumped to the back burner, behind other deadlines and priorities?

Education matters in the proposal profession, and you should take a look (or a second look) at becoming APMP certified. In a nutshell, you'll win more business, you'll make more money, and you'll open the door to career opportunities. If that doesn't put professional development front and center for you, I don't know what will!

Nearly 1,400 proposal professionals contributed their thoughts, experiences, and feedback to the 2015 APMP Industry Survey. While we're still sifting through all the data, it's clear that APMP certification, at any level, leads to better proposal writing. More than 78 percent of individuals who have one or more levels of APMP certification report enhanced proposal development skills as a result of having gone through the certification process.

The bottom line is that obtaining APMP certification will make you a better proposal writer, manager, or capture and business development professional. Immersing yourself in APMP best practices to prepare for the certification exam allows you to step back from your everyday deliverables so you can raise your career prospects to a whole new level. Continuing your proposal management education certainly matters, particularly when it results in enhanced job performance.

The importance of continuing education units (CEUs) cannot be stated strongly enough. CEUs are not hoops through which APMP certified members must jump; they are our industry's watchdog to make sure that professionals who were certified 10 years ago are equally as up-to-speed on best practices as those certified 10 months ago. CEUs communicate to our end customers that proposal and bid professionals take education seriously and that our industry maintains a high level of professionalism.

APMP remains as dedicated as ever to providing its hard-working membership with the industry's best education opportunities. You can be proactive about fulfilling your CEUs before your certification cycle deadline creeps up on you. Visit the certfication section of the APMP website for more information.

Hundreds of APMP members take advantage of the association's free monthly webinars on a variety of topics geared specifically toward bid and proposal professionals. These one-hour virtual sessions provide relevant education in a wide range of content that can help you on your certification endeavors.

We, the leadership at APMP, believe so strongly in the benefits of these webinars, presented by industry subject experts, that we decided earlier this year to make the monthly sessions free to all members. The value of these webinars—$300 annually—is now included in the price of APMP membership, to ensure that more of the professional development you need is at your fingertips.

Here are two recently recorded APMP professional development opportunities and an upcoming live session:

- October 14 session: Improving Contractor Performance Assessment Reporting System
- November 18 session: Women in Industry: Challenges and Milestones
- December 16 session

If there are topics you'd like APMP to consider for upcoming webinars, please contact me and share your thoughts.

APMP is arming bid and proposal professionals with the ability to make professional development a top priority. Make sure your oil is changed and you get your hair cut first, but put professional development right after that. It really does matter.

RICK HARRIS, CF APMP
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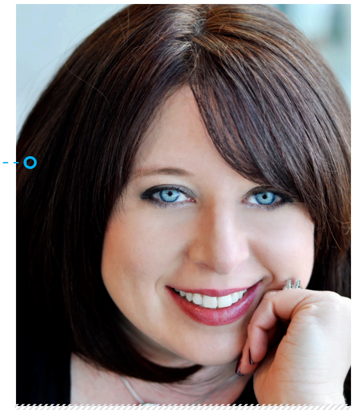
DO IT: VOLUNTEER!



As I round out my year as CEO of APMP, I'm reminded at every turn how important this association has become to me as a proposal professional. I owe so much to APMP, and I can only hope that my tenure has impacted the association even a fraction of how much it has shaped and influenced me.

I could not be more thrilled about where APMP is headed. I'm excited to celebrate these successes with you:

- Eight percent membership growth from January through September 2015, including 10 new corporate members
- The second largest APMP Bid & Proposal Con ever, held in Seattle, Washington, in May
- Members seeing the value of APMP certification, tracking with as many certified on the Foundation level, and nearly twice as many on the Practitioner and Professional levels as at this time last year
- The addition of a brand new chapter, APMP Japan, to service industry needs in Asia
- A proposal management professional track analysis, developed by the Professional Development Committee
- An increased staff, to focus on growth and serving the APMP membership

As I prepare to hand the leadership reins to the next CEO, I want to encourage you to get involved with APMP. Our association is only as strong as its speakers, webinar presenters, committee members, attendees, and volunteer leadership. Whether your schedule has a few openings or is beyond booked, you will find that making room to contribute to APMP is among the most fulfilling endeavors to which you can commit.

Serving as your CEO this year has been a priceless experience for me, and I am grateful for the opportunity to place my own personal stamp on this remarkable path that APMP and its members are traveling. Will you be among those leading us down that path?

Let's take the next step together. ●

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stages

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

FUNCTIONALITY

Time for a 'Black Hat' Review

HOW TO ACCENTUATE YOUR PROPOSAL WARDROBE

By Melynda S. Benlemlih

tip

Remember, **it's all about relationships.** Ask yourself, "Would you buy from you?"

Perfect competitive intelligence (CI) doesn't exist, for anyone. **Do the best you can with what you have.**

Preparing for a Black Hat review is like baking a cake: The **better quality ingredients** you use (people, CI, etc.), the more delicious your cake will be!

ORGANIZATIONS MUST MAXIMIZE talent, time, and financial investments when pursuing competitive business development. While not all organizations implement the full capture and proposal development life cycle, there is one must-have if you want to accelerate your efforts: the Black Hat review. Commonly known as a competitive analysis, a Black Hat review is conducted to ascertain the competitive positioning of the bidding organization. Creating a competitive advantage is not just about creating better technical solutions. Real advantage is created by better understanding your competitive environment, the markets you serve, and your place in them both.

Creating real advantage requires moving the traditional Black Hat review from a data-gathering exercise to an interactive group experience that leverages diverse knowledge, customer engagement, and competitive intelligence.

AN INTERDISCIPLINARY APPROACH TO GROUP PROCESS DESIGN

Fundamental elements of adult learning, design thinking, and innovation together create a dynamic experience. Adult learning recognizes that group participants all have valuable experiences to share. Design thinking focuses on understanding the user experience. Innovation excels when group participants have a safe place to share, to fail, and to try again.

STEP 1: SELECT YOUR TEAM

Diverse teams create a base of knowledge and experience that is far more powerful than what one or two individuals can hope to generate. Setting the team up with all the necessary disciplines—capture, technical, and customer knowledge—makes for a well-balanced and effective team.

STEP 2: CONDUCT PRE-WORK

No single participant will have comprehensive knowledge of the competition. Fill in the gaps by providing robust competitor profiles and allow participants to focus on problem solving and creation. A skilled competitive-intelligence expert can weave together multiple sources of information (professional network, open-source data, etc.) to create a more comprehensive product, above and beyond what is possible with a common Web search of the competition. Customer profiles are helpful, particularly to facilitate incumbent team members sharing their insights on customer needs, wants, and fears with other group members.

STEP 3: DESIGN WORKSHOP ACTIVITIES

Teams that participate in interactive exercises and capture ideas visually are able to work through challenges with greater effectiveness and create more relevant solutions. Root cause analysis may require a Socratic method, questioning participants to elicit discussion and discovery. For example, the 5 Whys technique continues to ask why until the root cause is discovered. Using a war gaming approach allows participants to put themselves in their competitor's shoes in the form of scenarios and see their organization's strengths and weaknesses from another point of view. These types of exercises can result in more viable and creative solutions to win a contest: in this case, a client contract. Action planning that captures task items, assigns owners, and sets timelines increases the likelihood that follow-on work will get done.

STEP 4: FACILITATE WORKSHOPS

Decide if you are equipped to facilitate the group process you have designed or if you need an external facilitator. If you have a high level of trust with your team members, can navigate group dynamics, and can disengage from the topic to drive the process, you should be well equipped to facilitate. If you need to participate, if there are contentious issues, or if it's a high visibility workshop, you may want to take advantage of a skilled facilitator who has "no skin in the game" to drive the process.

STEP 5: POST-WORKSHOP FOLLOW-UP

Quickly disseminate visual records of the discussions, decisions, and plans to the group, to capitalize on the momentum you've created. To warrant continued investment in Black Hat workshops, track how they inform subsequent decisions and competitions. Solicit participant feedback and share success stories to demonstrate the payoff. Execute a follow-up session immediately after a Black Hat review to compare what you learned against your existing win strategy. This will expose your vulnerabilities but will also more clearly identify where you can truly differentiate.

Implement these tools immediately to put (or keep!) your team on the winning path. ●

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This article is based on the National Capital Area APMP Chapter webinar "Black Hat Reviews—The Most Critical Shade in the Color Team Rainbow," presented by co-authors Melynda Benlemlih and Brian Lindholm.

C

STRENGTH IN NUMBERS

Section M Is King

MAPPING YOUR VALIDATED STRENGTHS TO THE EVALUATION FACTORS

By Dr. Robert S. Frey, APMP Fellow, MBA

tip

Ask and answer the question, "**What specific benefits will the government receive**—in terms they care about—from our technical and management approach?" Highlight those benefits.

Do the planning, thinking, and illustrating before you do the writing. You'll be amazed at how many bid and proposal dollars your company will save over time.

PROPOSALS ARE EVALUATED in accordance with strengths, weaknesses, deficiencies, and risks. U.S. government agencies evaluate proposals in terms of the strengths that the prime offeror provides in accordance with Section M, Evaluation Factors for Award.* In federal source-selection parlance, strengths are aspects of an offeror's proposal that enhance the potential for successful contract performance; provide additional value; deliver significant tangible and intangible benefits; or contribute toward exceeding contract requirements to the advantage of the government.

There are modest but critical variations of the formal definition of a *strength* across and within civilian, defense, and intelligence community agencies. Importantly, the solicitation document may not include the definition that the agency's source evaluation board or other proposal assessment panel will use during its deliberations. And there are cases wherein a direct, written question to the government agency's contracting representative for a specific solicitation results in an answer of "[The government] chooses not to respond to this question." See the sidebar Resources for Strength Definitions on page 11 for more information about the definition of a *strength* in the context of a particular agency or sector of government.

To increase the probability of winning, companies should determine and document their strengths relevant to the procurement early in the proposal response life cycle and continue to refine them. Strengths require quantitative and qualitative validation, and results of those strengths in the government customers' world must be highlighted. Think in terms of enhanced quality; schedule adherence or compression; cost control and, even more importantly, cost avoidance; and risk mitigation. Why these specific parameters? Because these same elements consistently appear in every Contractor Performance Assessment Report and Past Performance Questionnaire. Security, safety, health, and environment can be added to these core elements, as appropriate. When asked about the No. 1 focus of the NASA Langley Research Center, government civil servants immediately responded with "safety."

One successful technique for mapping your company's strengths to the evaluation factors is to build a two-column table in the proposal's executive summary. The left-hand column relays the evaluation factors for award, while the right-hand column lists your organization's evidence of strengths that correlate to each factor. Note the use of the word "evidence." It would be presumptuous to assert that the points included in the right-hand column are, in fact, strengths. That determination is for the government evaluators. The winner of the largest earth science contract at NASA Goddard Space Flight Center—SESDA II—had 19 strengths in its Source Selection Statement. The runner-up had 14.

*Note: There are cases in which federal government agencies do not follow the Uniform Contract Format of the Federal Acquisition Regulation. A recently released solicitation for a high-profile civilian agency procurement used Section 2, Evaluation Factors and Methodology.

Resources for Strength Definitions

The following resources can provide more information about the definition of strength used in the context of a particular agency or sector of government:

- *Source Selection Supplement to the Department of Defense Source Selection Procedures,* U.S. Army
- *Human Resources Activity Source Selection Plan, Best Value,* Department of Defense
- *Source Selection Plan Guidance and Template,* U.S. Agency for International Development (April 2, 2013)
- *PBS Leasing Desk Guide,* Chapter 13: "Source Selection," U.S. General Services Administration (Sept. 27, 2011)
- Previous Source Selection Statements issued by the particular agency, which can be obtained through Freedom of Information Act requests.

In addition, you can review Government Accountability Office (GAO) protest decisions that involved the specific agency with which you are pursuing business. GAO decision documents may contain insights into the working definition of a strength. For example, the definition of a strength for the Centers for Medicare & Medicaid Services was determined to be an aspect of an offeror's proposal that rises to the "level of being a meaningful advantage."

IN FEDERAL SOURCE-SELECTION PARLANCE, STRENGTHS ARE ASPECTS OF AN OFFEROR'S PROPOSAL THAT ENHANCE THE POTENTIAL FOR SUCCESSFUL CONTRACT PERFORMANCE, PROVIDE ADDITIONAL VALUE, DELIVER SIGNIFICANT TANGIBLE AND INTANGIBLE BENEFITS, OR CONTRIBUTE TOWARD EXCEEDING CONTRACT REQUIREMENTS TO THE ADVANTAGE OF THE GOVERNMENT.

Recommendation: Strive for 25.

Finally, companies should consider making their investments in people, processes, knowledge, and technologies within the context of "Can this new talent or asset be framed as a strength in an upcoming federal proposal?" The organizations that have adopted this approach have realized significant benefits in terms of booking new and recompete business.

Now go win stuff! ●

Dr. Robert S. Frey, APMP Fellow, MBA, PMP®**,** TOGAF v9.1 certified, is co-owner and principal in the consultancy Successful Proposal Strategies LLC. During the past eight years, he has provided hands-on support to customers which has contributed directly to more than $5 billion in contract awards. His comprehensive book *Successful Proposal Strategies for Small Businesses* reflects insights, lessons learned, and best practices from his 28 years of professional proposal development experience. He can be reached at + *rfrey@proposal23.com* or 410-812-1177.

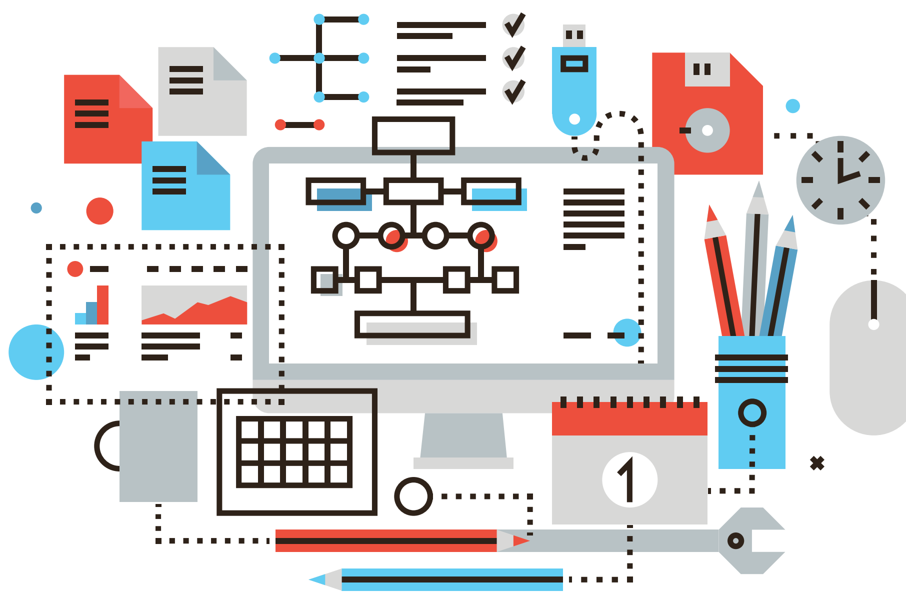
STRONG LANGUAGE

Are You Content with Your Content?

STANDARDIZING THE CONTENT DEVELOPMENT PROCESS

By Krishnakumar (KK) Iyer, CP APMP

ASK ANY SALESPERSON to create content, and he or she is likely to get rather creative with excuses. Creating content requires the ability to articulate details in writing—a skill that seems formidable to many sales teams. Yet, those same sales teams readily admit that the shortage of relevant content is a problem area. To address this challenge, proposal management teams need a strategy and process in place for content development.



THE ROLE OF CONTENT IN THE PRE-SALES PROCESS

Varied types of content are required during the pre-sales process—from introductory documents and white papers to specific decks for client presentations. As the proposal team digs deeper into the proposal stage, the need for content becomes greater, especially for large and complex proposals.

Many organizations face challenges when it comes to developing ready-to-use content:

- How is templated content stored?
- How can that templated content be reimagined for a specific client?
- What is the cost-effectiveness of creating and updating content?

To meet these needs, organizations must invest in adequate resources to create and maintain content.

NEED FOR STRATEGY AND PROCESS

Without a strategy and process in place, new content is redeveloped from past projects or is generated on the fly. Important aspects of content, such as client focus and subject relevance, get lost in this convoluted process. Effective content development requires a strategy in terms of how to organize the content as well as the establishment of ongoing processes.

Content maintenance requires the investment of every other support area, or the lack of current content will be felt during the proposal process. The stakes are high during proposal time, and without proper content maintenance, teams spend valuable time bringing the content up to date, when they could have been focusing on winning the opportunity.

OUTSIDE-IN VS. INSIDE-OUT

The creation of strategy and process is one challenge; another challenge organizations face is the perspective used within the content. Most content takes an inside-out view, explaining to the potential client why the organization is best for the task at hand. Instead, content needs to be client-focused (i.e., outside-in) for it to have impact.

Content is often written by team members who are internally focused, such as delivery or technical people. While it may be appropriate for those individuals to produce the initial draft, the final product needs to be critically reviewed for client focus and the outside-in vantage point.

STANDARDIZED CONTENT DOES NOT MEAN STATIC CONTENT. THE CONTENT NEEDS TO BE SUPPORTED BY PROCESSES THAT WILL ENSURE THE ACCURACY AND RELEVANCE OF THE CONTENT FOR EACH CLIENT.

LESS IS MORE

Content writers should adopt a less is more mantra. Avoid verbose monologues, keep sentences short (fewer than 20 words), and use active voice.

STANDARDIZED CONTENT

Pre-sales teams need to continuously look at past requests for information and proposal efforts to identify areas where content can be standardized. Standardized content does not mean static content. The content needs to be supported by processes that will ensure the accuracy and relevance of the content for each client.

STRUCTURAL INTEGRITY

The right content sets a strong foundation for providing accurate responses. Organizations need to ensure the infrastructure is in place for solid content development, further ensuring the content remains relevant for ongoing and future sales efforts. ●

Krishnakumar (KK) Iyer, CP APMP, is CEO of MindIT, which provides end-to-end bid solutions for companies who are in complex B2B engagements. MindIT has been engaged by clients such as Capgemini, Hexaware, and Zensar. KK also is a contributing author for APMP's Body of Knowledge. He can be reached at + *krishnakumar.iyer@mindit.co.in* or +91 9970 621342.

SALES STRATEGY

Tune Up Your Proposal Engine

FOUR SOLUTIONS TO PUSH FULL STEAM AHEAD

BD

By Callie Apt, CF APMP

ENGINES HELP US achieve a desired outcome, typically transforming one thing into another. In a vehicle, an engine ignites a mixture of air and gas to move a piston, rotate a crankshaft, and generate the power to move.

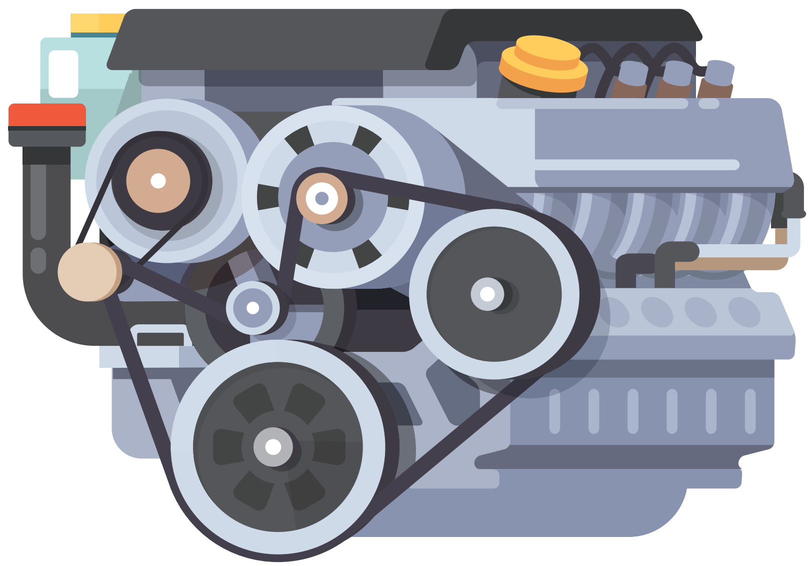
No matter what industry you represent, sales is the means by which the business produces revenue. A proposal team plays a vital role in generating the power required to produce revenue—that is, telling a compelling story, whether the goal is to retain existing clients or to acquire new ones. Why? Most enterprise purchases typically include an RFP process. This leads proposal leaders to ask: Is my organization's proposal engine firing on all cylinders? What "miles per gallon" is my sales content delivering? Do our processes need a tuneup?

RESPONDING EFFICIENTLY AND EFFECTIVELY

There are four key elements your organization can focus on to enable your proposal team to respond to RFPs more quickly, increase quality and customer centricity, and help sales generate more revenue.

1. Hire (or Train) a Proposal Dream Team

Beyond the thrill of putting forward a winning proposal, there is the exciting challenge and opportunity to create a winning expert proposal team. When hiring proposal talent, first determine what the ideal proposal team would look like, based on your organization's specific RFP volumes, sizes, and complexities. What level of experience and skills



do the candidates have? What training certifications are necessary? What career development paths can be put in place? How will the team partner with sales? How will success be measured and performance be rewarded? The answers to these questions may lead to investing in proposal writing training for the entire department, drawing on proposal consulting resources, or introducing new roles to create a pipeline of talent.

2. Drive Opportunities with an RFP Template

CEB, a best practice insight and technology company, recently conducted a study of more than 1,400 business-to-business customers across industries. The study revealed that 57 percent of a typical purchase decision is made before the customer even talks to a supplier. This behavior underscores the need to create a productive connection with customer stakeholders and to guide them in their buying. Your proposal team can play a key role in helping its sales and business development counterparts, through use of an RFP template, to shape opportunities to the company's advantage.

A template makes it easier for teams to answer RFPs, identify differentiators that matter to the customer, pre-frame the competition, and position your organization as a consultative partner. Make several versions of the RFP template available for the sales and business development teams based on client needs and solution offerings, and train salespeople on the template's use.

3. Create a Systematic, Scalable RFP Process

A structured RFP process based on best practices and championed at the executive level is important. Evaluate your process steps, tools, and training materials to make sure they are effective. Set up a half-hour a week for a team member to share a proposal best practice topic, leveraging APMP resources, articles, and tools. Written assignments after the meeting ensure ownership and accountability. Sharing with colleagues helps team members gain confidence in subject matter knowledge and expertise.

4. Accelerate Response Times and Increase Client Focus with a Proposal Software Tool

Shipley Associates' *Proposal Guide* states, "The best tools empower the user to be better organized, more customer-focused, and more responsive to the specific requirements of each business opportunity." Proposal software can help accomplish these objectives. According to industry best practices, 60 to 80 percent of proposal content should be created and easily accessible from a proposal library, allowing an organization to focus efforts on the storyboard and to articulate unique differentiators and solutions.

There are two key components to consider when it comes to proposal management software. First, create a database of approved proposal language for the proposal team. Second, provide a set of proposal documents for field sales, available on demand, with the capability to quickly draw on templated content that can be customized through menu selections.

An effective proposal organization has engine-like processes that work together effectively and consistently. To ramp things up, sometimes all you have to do is check under the hood.

Callie Apt, CF APMP, has eight years of experience leading proposal management teams. She is a proposal manager in strategic sales solutions for Domo, a cloud-based business management software company. She can be reached at + *callie.apt@domo.com.*

EXPERTISE

Grammarians at the Gate

EMBRACING YOUR EDITORS CAN BE THE DIFFERENCE BETWEEN YES AND NO

By Kate Reddy

NOBODY ON A proposal team likes the editors—those nagging grammarians who hack up your prose. Why, you could find mistakes as well as they do—better, in fact—if you had the time. Remember, proposal coordinators, managers, artists, writers, reviewers, and editors are all on the same team trying to meet a deadline and produce a winning proposal. Instead of fighting with editors, work with them to your advantage.

THE DIFFERENCE BETWEEN EDITING AND PROOFREADING

Editing and proofreading are different tasks. At a high level, an editor reviews a document for its structure and organization and scans for major grammatical, tonal, format, or clarity problems. For proposals, this includes a review of the strategy for winning and whether or not the writers have addressed all requirements.

Content edits are for ensuring the accuracy and validity of the content. This task usually falls to a subject matter expert. A copyeditor handles the detail edit, which includes a review of a document for organization, format, grammar, style, and consistency as well as for clarity, spelling, punctuation, and typographical errors. Proofreading includes a review for typographical, spelling, and punctuation errors as well as formatting problems. A proofreader also checks the pagination and ensures the accuracy of the table of contents, index, page numbering, footers, and headers.

LET EDITORS HELP YOU WIN

Many proposal elements count more than correct punctuation or proper usage: a persuasive message, sturdy win themes, competitive pricing, and proven experience. However, if you were neck and neck with a competitor that matched you for all those things, you might wish you had taken the time for a professional edit and proofread of your proposal. It might be a day when a reviewer does not want to see your company's name at the start of every sentence. Does a typo matter less than an incorrect diagram? Yes, until a typo changes your price by a decimal point or a C-level reviewer goes ballistic over a misspelled name.

For the best results with editors, agree to some rules:

- Designate who is doing what level of edit and include these definitions for all reviewers.
- Choose a style guide and stick with it for points outside the proposal's requirements. Include proposal particulars on a project style sheet.
- Read the style sheet, keep it handy, and defer to it when there is an argument.
- Focus on your message. Ask an editor to hone it.
- Say so if you don't understand or agree with an edit. Give the editor a chance to explain. A good editor will change his or her mind if it makes sense to do so.
- Don't cling to inflated language that serves no purpose. "Prior" doesn't sound smarter than "before." Saying "we believe" doesn't make your opinion more forceful; it just takes up space.
- Remember the difference between an edit and a

proofread. People often suggest good edits at reviews and should be heeded, but no one needs to proofread at color-coded reviews. That's a waste of time.

> DOES A TYPO MATTER LESS THAN AN INCORRECT DIAGRAM? YES, UNTIL A TYPO CHANGES YOUR PRICE BY A DECIMAL POINT OR A C-LEVEL REVIEWER GOES BALLISTIC OVER A MISSPELLED NAME.

EDITORS CAN CLEAN UP YOUR MESSAGE WITHOUT CHANGING IT

A good editor can be the best objective reviewer available. You know your business far better than an editor does. That's why an effective editor will ask for facts and figures that support your statements. You might be, literally, a rocket scientist. Therefore, you understand the principles of science. In the same way, an editor understands grammar, punctuation, spelling, and tone. Stick to what you know. A good editor will appreciate your knowledge and experience and understand that you might be too close to the subject to present it as clearly as needed.

KNOW THAT GOOD EDITORS WANT TO MAKE YOU LOOK GOOD

A careful editor is not a scold, but someone who wants you to look good—a sculptor who makes sure your writing has no confusing or erroneous parts. A good editor can make your story compelling.

Depend on editors to save you time on a proposal project. Agree to rules up front and adhere to them. Trust editors with your message. If you work together, you have a better chance of winning. ●

Kate Reddy is co-founder and president of McKinnon-Mulherin Inc., a communication firm. Previously, she served as manager of documentation and project assignments for the Franklin Quest Consulting Group, manager of technical publications at Intel Corporation, and senior editor at Wasatch Education Systems. She can be reached at + *kreddy@mckinnon-mulherin.com.*

PM

MODEL BEHAVIOR

Send Out the APB for Proposal Writers of All Kinds

PROVIDING THE NECESSARY DETAILS FOR A WIN

By Julia Quigley, MA

PROPOSAL MANAGERS OFTEN receive poorly written proposal content from technical experts and inexperienced staff members. This leads to frustrated writers, inefficient proposal reviews, and wasted time while proposal managers re-work content. As a solution to this challenge, proposal managers should train contributors to use a standard writing model. The APB model is a repeatable method for writing proposal content that is compliant, compelling, and easy for evaluators to score.

HOWEVER YOU SCALE THE MODEL, PACKAGING YOUR TEXT INTO APB MAKES IT EASY FOR EVALUATORS TO FIND SPECIFIC CONTENT. PUTTING KEY WORDS AND BENEFITS AT THE BEGINNINGS AND ENDS OF PARAGRAPHS MAKES IT EASY FOR SKIMMERS TO IDENTIFY THE STRENGTHS OF YOUR PROPOSAL.

THE APB MODEL

APB stands for *approach, process,* and *benefits*. This structure gives evaluators the details so they can easily record a solution's strengths and rate the proposal as outstanding.

- **Approach:** The first one to three sentences of the paragraph briefly summarize the approach and benefits. These sentences concisely state what you will do for the client and what benefits the client will receive.
- **Process:** The process section is the meat of the paragraph, containing all the details and graphics the client needs to evaluate the solution. Include the steps, tools, and methodologies you will use to accomplish the approach, including the features you identified in pre-proposal planning.
- **Benefits:** Benefits provide the logical endcap. Conclude your paragraph with one to three sentences that fully explain how the process yields those benefits. You can include proof points and substantiation in the benefits section to conclude your paragraph, or you can include them immediately after you introduce a feature in the process section.

While the model is based on a paragraph structure, you can scale the structure to suit your needs. If your requirements call for more detail, make the A, P, and B each its own paragraph. You may even break up the process section into multiple paragraphs with strong transition sentences. For simpler requirements, condense the APB into just a few sentences.

However you scale the model, packaging your text into APB makes it easy for evaluators to find specific content. Putting key words and benefits at the beginnings and ends of paragraphs makes it easy for skimmers to identify the strengths of your proposal.

APB IN ACTION

A client has put out a requirement to protect a wood deck for at least five years. Below are two common non-APB responses:

1. We will protect your wood deck for at least five years with industry best tools and equipment.
2. Two of our senior carpenters will protect your wood deck for at least five years by applying two coats of waterproof stain with a three-inch bristle brush.

The first is the bare minimum of written text. It repeats the requirement without adding any value and asks the evaluator to trust that you can do what you say you will do. The second response adds value by explaining how the requirements will be met, but it doesn't clearly state the benefits or the strengths of the approach.

In contrast, the APB example presented here contains the same

information but packages it so an evaluator can easily score the section.

A We will protect your deck for 10 years by applying two coats of waterproof stain with tools that enable it to deeply penetrate the wood.

P Two of our senior carpenters will use a three-inch bristle brush to apply two coats of waterproof stain in dark brown. The bristle brush penetrates the wood, whereas spray-painting simply sits on top of the wood.

B Because our carpenters use a bristle brush, your deck will be protected for 10 years, twice the minimum requirement.

The approach summary is effective for skimmers because it contains the key words about protecting a wood deck and previews special tools. The process section contains information about who is doing the work and what tools will be used. This section also ghosts the competition by explaining how the method chosen is superior to the spray-painting approach competitors may pitch. The benefits section connects the dots for the reader by explaining how the approach exceeds the minimum requirements—a clear strength. The client could nearly copy and paste the last sentence into its source-selection justification text. Anyone would select this proposal over a competitor pitching a spray-paint stain. When your writers adhere to APB, you can make it straightforward for the client to pick your proposals against your competitors'.

ADOPT APB

Once APB is implemented, the content you receive from writers will contain the necessary elements for an outstanding proposal, so you'll spend less of your valuable time re-working their text. When your reviewers aren't focused on poorly written text and compliance, they can better assess the solution, score the proposal as evaluators would, or review the proposal against quality measures. ●

Julia Quigley, MA, managed proposals for small and mid-sized federal contractors and taught introductory and persuasive writing classes at Texas State University prior to joining Lohfeld Consulting Group's leadership team. She can reached at + *jquigley@lohfeldconsulting.com.*

Commercial

Take Three Months to Fix Your Proposal Management Process

By Ghim Meng (Jimmy) Low

The nature of our customers' business has changed dramatically over the past two years. When they face cost pressure and competitive environments to improve their services, we, the internal information and communication technology (ICT) service provider for the Deutsche Bahn group of companies, also feel the heat. The "right-to-first-offer" clause is being negated by public bids or invitations to tender (ITT). To compete, ICT Solutions Passenger Transport, our sales organization responsible for passenger transport customers, looked again at its practices and processes for developing and responding to bids.

HISTORY

In December last year, we surveyed those involved in proposal development, including account managers, on common issues they faced. The top three bottlenecks evolved around (1) unclear proposal team composition and interaction; (2) long proposal development periods, averaging 50 days; and (3) lack of business-case consideration in decision making—all resulting in lower customer satisfaction regarding our solutions and responsiveness.

We also found that the top 10 percent of proposals generated 66 percent of book orders, valued at more than 500,000 euros per order. We decided to use best practices from the APMP Body of Knowledge (BOK) to improve our proposal development process for the top 10 percent and to establish our first bid management process. The aim of our improved process was to achieve quick wins through implementing APMP best practices.

THE SETUP

The Team

The proposal manager has full responsibility for the proposal development and works hand in hand with account managers to define and refine the sales and positioning strategies throughout bidding. We also recognized that a proposal manager doesn't just ensure a proposal is delivered but also guides how it should be developed, including its content, format, and presentation.

We kept our team small, with the proposal manager as a pivot point for all communications. Each (nonfixed, virtual) team was made up of a proposal manager, an account manager, and key subject matter experts (SMEs). Only SMEs for relevant topics were brought in to analyze and respond to the customer requirements. The small team allowed better team management in a fast-moving, fixed-deadline environment.

The Tools

The APMP BOK and Shipley's *Proposal Guide* gave clear guidance and checklists to help establish a disciplined gate process. We implemented two gates—bid/no bid and offer/no offer—as essential decision gates in our proposal development process.

THE STRATEGY

During the bid/no bid qualification phase, the team discussed 15 questions broken into three key criteria tests: strategic customer fit, delivery readiness, and bid team readiness. This was a major leap for us, as it forced the team and our management to confront these 15 strategic questions and be certain that each proposal was worth developing. Our focus was on not only responding to customer requirements, but also determining whether the bid team was committed to producing winning proposals.

For bids valued at more than 1 million euros, a decision-making process based on the business case was introduced during the solution design phase. While the technical solution was being crystalized, its cost and winning price were fine-tuned. This approach allowed us to present a business case to the management for approval. With this critical offer/no offer gate, the account manager avoided unprofitable business.

LEARNING FROM BOK AND PAST BIDS

APMP best practices served as a template for us to to quickly address the pain points in our process. We were able to establish a proposal management process in three months, using the APMP BOK as guidance for template creation and continuous improvements.

We integrated lessons learned from the team and our customers into our bid management process, and we continue to revisit them at the start of each new bid, to ensure past mistakes are not repeated. We submitted our first proposal to an ITT in February and have been actively responding to bids on average of one per month.

Our experiences proved that sometimes there is not the luxury of time to develop a full proposal process and test its effectiveness. Our business needs forced us to quickly identify and address the urgent needs. We can further refine the process and address other areas of improvement during off-peak periods. ●

Ghim Meng (Jimmy) Low, MBA, APMP, is lead bid manager for ICT Solutions Passenger Transport with DB Systel GmbH, the internal ICT company of Deutsche Bahn AG in Frankfurt, Germany. He was a junior bid manager at Lucent Technologies Asia Pacific from 2000 to 2012 and has 13 years in the telecoms industry in Malaysia and 4 years in Europe. He can be reached at + *ghim-meng.j.low@deutschebahn.com.*

Federal

Gearing Up for Government Proposals

By Sally Jacques, CP APMP, M. Diane McCormick, and Dr. Robert Frey, APMP Fellow, MBA

In 2014, the U.S. government awarded $445.5 billion in federal contracts, according to *www.usaspending.gov.* Companies hoping to obtain these contracts must be familiar with the government's procurement processes. In large part, these are legislated by the Federal Acquisition Regulation (FAR).

For those who have never responded to a government contract request, the first one can be intimidating. Don't let the red tape stop you. Instead, be prepared for the expectations, and your company could win the bid.

Some companies, small businesses in particular, find the federal government selection process to be daunting. However, many small businesses have their first break that promotes substantial growth through a sole-source government contract.

MAKE THE DECISION

Before putting time and money into preparing a proposal, it's essential to engage in the bid/no-bid decision-making process. The federal government will not reimburse bidders for expenses associated with submitting proposals, so it's up to bidders to decide if they can swim after they dive into the pool. Pursue work in accordance with strategic plans. Determine core competencies and available resources and whether there is appropriate past performance to qualify.

STAY IN THE RUNNING

Compliance is a major factor in a proposal's chance for consideration. Government bids must meet basic requirements. The first step is to meet the deadline. According to the FAR, the government cannot legally accept any proposal received after the deadline. For proposals filed electronically, the government server has a clock that counts to the hundredth of a second. Bidders don't see it, but it's the only clock that matters.

Murphy's Law loves the proposal process. In electronic filings, provide time for server crashes or the "please wait" circle of death. When hand-delivering proposals, plan for traffic delays, flat tires, and the layers of security needed to gain access to government buildings in this post-9/11 world.

Contractors pursuing federal opportunities must be registered with the System for Award Management *(www.sam.gov)*, a process that creates the required Commercial and Government Entity (CAGE) Code, issued by the Defense Logistics Agency. A Data Universal Numbering System (D-U-N-S) number is also required and can be applied for at *fedgov.dnb.com/webform.*

Organizations in highly regulated industries such as financial services must ensure all required documentation is in one place, with sufficient original and certified copies.

BEYOND COMPLIANCE TO THE EVALUATORS

Once the document has passed the compliance test, it reaches the evaluators, the point where you want to

make a good impression. Seasoned evaluators want to see that bidders have taken the time and effort to win. The document should be well prepared and clearly packaged, with responsive answers to questions, and must clearly show that the bidder has the capacity to do the work and has priced it accurately. Nearly every competitive solicitation seeks the bidder's technical approach, management approach, staffing, past performance, and cost, plus other factors. Evaluators first assess if an organization can do the job based on those factors—eliminating some bidders—and then assess the pricing.

An organization that makes the short list may be invited to present to key decision makers. Preparing for this stage includes how the organization will approach each bid, asking: Can the work be done? Is the work wanted? What will put an organization in front of the race? Prepare documents that demonstrate capabilities and descriptive solutions.

When it comes to the evaluation process, every agency differs. Federal evaluators review and assess competitive proposals according to specific solicitations' evaluation factors for award. Solicitations also include guidelines detailing parameters such as margins and page size, but it's equally important to note what's precluded. Some requests specifically forbid fancy covers or photos, and proposals will be discarded for violations. Time invested in flashy packaging is better spent ensuring well-crafted documents.

Proposals submitted in a FAR-driven federal solicitation will seek Representations and Certifications (Section K, in most cases) that establish the bidder's socio-economic status—for instance, whether it's woman- or minority-owned, veteran-owned, or in a Historically Underutilized Business Zone (HUBZone). Though not every agency follows the FAR, such as the U.S. Senate and the U.S. Postal Service, those classifications can be important differentiators for companies bidding on work.

A Few More Things to Know

- Each state has its own bidding opportunity portal, unregulated by the FAR. These portals can provide background and links to additional resources and information.
- Businesses new to federal procurement can learn more about the process through a range of courses and seminars. Some credible resources can be found at TargetGov, the Public Contracting Institute, and the U.S. Small Business Administration.
- Despite the Freedom of Information Act, the federal procurement process is tightly closed. A company that requests a competitor's proposal will often get a heavily redacted version.
- Every federal competitive procurement ends with a debriefing, in the form of a phone call, fax, face-to-face sit-down, or other format, such as a Source Selection Statement or PowerPoint slides. Win or lose, companies should take advantage of the debriefing to gain insight for the next proposal. Lessons learned apply to the agency involved and provide insight into the process.

GOING DIGITAL

In many cases, proposal documents can be submitted electronically, but be aware that there's no single, comprehensive portal. Often, proposals can be submitted through a portal specific to the agency or contracting vehicle, such as General Services Administration's Alliant Small Business system.

The Federal Business Opportunities, or FedBizOpps, site is a resource for opportunity announcements. However, it's not an application portal, and it might not post everything—for instance, opportunities open only to prequalified businesses for specific Governmentwide Acquisition Contracts (GWACs) or Multiple Award Contracts (MACs).

BE PATIENT, VERY PATIENT

There's a huge adrenaline rush after submitting a proposal—especially if you were very close to the deadline. Unfortunately, experience proves there is no way of knowing how long the outcome will take. It could be weeks, months, or even years, wreaking havoc on pricing and sales pipelines. Winners may scramble to staff an award, once announced.

GEARED UP FOR GOVERNMENT

Winning government work is not an overnight success, but it's entirely possible—and rewarding. Take the time to familiarize yourself with what government wants from its suppliers, follow the rules, and approach each bid strategically. ●

This article originally appeared as "Gearing Up for Government Tenders," by Sally Jacques, CP APMP, of APMP South Africa, in the September 2015 issue of *South African Business Integrator.* It was adapted for the U.S. proposal process by freelance writer M. Diane McCormick with the help of Dr. Robert S. Frey, APMP Fellow, PMP®, TOGAF V9.1 certified, MBA, co-owner/principal of Successful Proposal Strategies LLC.

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THE HYBRID APPROACH

Situational Strategies for Proposal Development

By Kevin Switaj, Ph.D., CF APMP

There is a buzz in the proposal development industry regarding the inevitability and benefits of virtualization.[1] The last decade of technological advancement has created opportunities and tools that allow our trade to flourish anywhere. As the APMP Body of Knowledge (BOK) states, "Business acquisition teams are able to support the opportunity planning, proposal planning, and proposal management phases equally effectively whether working from a corporate or field office, local coffee shop, home office, airport, or car."[2] With financial pressures and a new generation of proposal professionals to appeal to, many are willing to part with the standard practice of co-location and adopt a purely virtual approach.

Before going all in on remote development, however, proposal development professionals need to take a collective breath and weigh the risks of fully abandoning the war room. For all its strengths, virtual proposal development has some serious shortcomings, especially around communications and collaborative development. As a result, a place still exists for in-person proposal development. By holding targeted, focused, in-person meetings during the key collaborative stages of the proposal process and then enabling content creation to occur virtually, quality and productivity can be maximized while minimizing risk.

VIRTUAL TOOLS FOR VIRTUAL CONVERSATIONS

There are dozens of communication tools available to help you get your job done no matter where you are, and many of them are available on multiple devices for no or little cost. Here's a short list to determine the best option for your proposal development process.

FaceTime is available on all iOS products, which means you can video conference from your Apple computer with someone on an iPhone on the other side of the world. Its basic capabilities make it good for a conversation that should happen face-to-face but doesn't require sharing files or presentations.
Additional capabilities: Camera view swapping (mobile)
Number of participants: Two
Visit *www.apple.com/facetime.*

GlobalMeet is a cloud-based videoconference and presentation program. The cloud service makes it easy for users to join calls without needing to download an app or program, but there is an app available for iOS, Android, and Blackberry users.
Additional capabilities: File sharing, screen sharing, meeting recording; meeting hosts can hand off to other callers
Number of participants: 125–325; varies for different services and subscription level
Visit *www.globalmeet.com.*

Google Hangouts provides a seamless video and voice experience for users with Gmail or Google+ accounts. The conversations are synced wherever you log in with your Google credentials, so there's no hassle to find the last conversation with your proposal manager. It's available on mobile for Android and iOS and for iOS and Windows desktops.
Additional capabilities: Photo, .GIF, and map sharing; desktop-to-mobile conversations
Number of participants: 10
Visit *hangouts.google.com.*

GoToMeeting offers personal meeting rooms to subscribers, which creates a custom URL for you to provide to meeting attendees. The service is also integrated with both Outlook and Google calendars, so invitations are a breeze. Users can join from the desktop version or use the mobile app on iOS, Android, and Windows devices. Try it for free with up to three participants.
Additional capabilities: Screen sharing, meeting recording
Number of participants: 3–100
Visit *www.gotomeeting.com.*

PRODUCTION, COLLABORATION, AND INNOVATION

The best way to determine the tasks best suited for co-location or remote support is to consider the level of collaboration required. In defending her controversial decision to end telework at Yahoo, CEO Marissa Mayer stated, "People are more productive when they're alone, but they're more collaborative and innovative when they're together."[3] A Cisco study found executives believe in-person collaboration is critical for more than 50 percent of strategic and tactical business processes, including brainstorming and project kick-offs. Seventy-five percent of those surveyed believe in-person collaboration is critical to corporate success.[4]

For collaborative activities, co-location in the same physical space provides the best opportunity to create quality work products. Having a team in a single place promotes creativity, leading to better and more innovative solutions. Developing common themes and messages, including strategy and solution development, represent the perfect opportunities for co-location. Being in a single location creates an environment where the sharing of ideas is enabled, whether it be in the war room, in an office, or even in a coffee shop. As John Sullivan writes, "Innovation is maximized when there is a high volume of serendipitous meetings between coworkers from different teams and functions."[5]

REMOTE ACCESS

Studies back up the assertion that working remotely increases employee productivity. A CompTIA survey found 67 percent of respondents ranked increased productivity as the key benefit of telecommuting.[6] Given this evidence, proposal teams should encourage writers to develop content, including details around a collaboratively developed solution and proposal narrative, wherever writers are most comfortable, including remotely. Successful remote development requires continual communication among team members. Allowing contributors the flexibility to work when and where they find themselves best able to focus leads to successful, quality work product and can help reduce overall bid costs. In addition, it opens up the pool of potential contributors. If a company has a geographically dispersed workforce, the proposal team can find key individuals from anywhere within the organization instead of focusing on support in and around the home office.

FACE-TO-FACE TIME

Many proposal development activities can be successfully accomplished either virtually or in-person. For example, kick-off meetings and daily stand-ups help foster team building if people are in the same space. However, this is

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not always possible. When people are in the same facility, they should meet in a single location for these meetings. Having people connect virtually does not diminish the effectiveness of these sessions, if they are well run and focused on the objective.

ONE SHOE DOESN'T FIT ALL

Using a hybrid in-person/remote proposal development strategy is not feasible for all bids. For example, it is not cost-effective to pursue the hybrid approach on quick-turn task orders with contributors spread around the country or internationally. Whenever possible (especially on company-critical bids), all steps need to be taken to leverage the power of collective collaboration. A proposal manager may need to travel to interface with internal customers when work sites are in multiple locations. Working with your executive team to make short-term co-location possible provides a great return on investment through a higher quality proposal.

BALANCE IS THE END GAME

As a proposal professional, your focus is to best leverage your resources to the end of producing the highest quality proposal. By putting people in an environment most conducive to the type of work required and balancing in-person and virtual work, you can achieve high-quality, cost-effective bids and make the best use of your entire resource pool.

Kevin A. Switaj, Ph.D., CF APMP, is director of proposal development at LongView International Technology Solutions, a mid-sized government contractor. He can be reached at + *kswitaj@longviewinc.com.*

Endnotes

1. For example, see Beth Wingate, CF APMP Fellow, et al., "AppMaven and Tech Gurus: How Platform and Tool Convergence Can Enhance or Change the Way You Work"; John Sullivan, "Requiring Employees to Work On-Site Spurs Innovation," *US News*; Donna Creason, CF APMP, "Going Virtual: Is Virtual Proposal Development Right for You?" *APMP Journal,* Vol. II, Issue 1.
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A LIFETIME'S *Worth of Wins*

The View from Outside the Comfort Zone

BY NIGEL DENNIS, CPP APMP FELLOW

Proposal management is the profession of winning, and we all know what winning feels like. But how much more exciting is winning when you least expect it? And what about winning multiple times in one night? This is a story about winning, in a way I had never experienced before in my professional life.

STEPPING WAY OUTSIDE THE COMFORT ZONE

Back in May 2008, I had just invested my year's savings to travel halfway across the world to Rancho Mirage, California, from my home in Perth, Australia, to attend my first APMP international conference. I had never been to the United States before and knew no one in the group of more than 600 strangers when I arrived at the conference on the first day. At the time, there wasn't an APMP chapter I could affiliate with.

The 30 hours of travel and 12-hour time difference meant my body was jet-lagged and my mind fatigued. My nerves were turning cartwheels when I thought of presenting later that day. What could I possibly say to a room of seasoned proposal professionals that they hadn't heard before? Working crowds, presenting, and networking had never been my thing. To make matters worse, it was happening in a place that was foreign to me. I was overwhelmed by the magnitude of my ridiculous decision to attend the conference. I had never felt so far outside my comfort zone. All I wanted was to get in my time machine and crawl back under my little rock in Australia.

FEELING AT HOME, PROFESSIONALLY

Fast-forward seven years to May 2015. I was at the APMP Industry Awards Dinner at Bid & Proposal Con

in Seattle, Washington, for my seventh APMP international conference. Now there existed an Australian New Zealand (ANZ) Chapter, and I was looking forward to celebrating chapter and member accomplishments at this prestigious event, even though the ANZ Chapter was not up for any awards. We had specifically decided not to nominate as we built toward our chapter's first regional conference in March 2016.

Compared to my experience seven years earlier, I certainly felt much more comfortable. I knew more people this time around, good friends and respected colleagues who I had learned from and shared with. I still felt jet-lagged, but after 20 years in the proposal profession, my body was getting better at coping with it. The biggest difference this time was—while I was still 9,000 miles from where I lived—I now felt as if I was home, at least professionally.

THE NIGHT I DIDN'T EXPECT

One of the first awards announced was for the chapter with the most corporate memberships sold. The ANZ Chapter won. I was honored to accept our chapter's first award. I was surprised but extremely pleased, as corporate memberships had been a focus for us over the last two years. Knowing that our persistence, hard work, and belief were finally starting to pay off was incredibly fulfilling and motivating.

Then the announcement of two more awards really knocked me off my feet. The first was Chapter Chair of the Year. To hear my name was an incredible surprise, especially as I knew there were many wonderful chapter chairs doing great things. It was moving to accept that award and be recognized, especially as it is really an award for the whole chapter. An effective leader is only as good as his team, and this award was a reflection of the dedicated and hardworking people on the ANZ Chapter committee.

The final award announcement of the evening was the prestigious Fellow Award, APMP's highest honor, based on an individual's contributions to the industry over the course of his or her career. Learning I had joined that select group, when I know so many other deserving people, was incredibly humbling.

THE WINNING FEELING THAT LASTS

Climbing the steps to a brightly lit stage for the third time that night in front of standing, applauding people was just too much for my emotions. Perhaps I had had one too many lemonades at that point. Whatever it was, once again I was truly overwhelmed by the experience at an APMP conference. This time, however, it was a much more enjoyable feeling, and that ridiculous decision seven years ago to step outside my comfort zone was put into stark perspective.

Sure, external recognition and those feelings of exhilaration are fantastic when we win and are rewarded for our efforts, as I found out on that night. The celebrations and fountain hopping afterward are also a lot of fun. But the satisfaction of knowing your thirst for knowledge has been justified, the decision to pursue your passion has paid off, and durable relationships have been formed is the winning feeling that lasts.

APMP is a diverse and eclectic group of individuals. It is through this group that I have found the profession I truly enjoy. I can't promise that you will win multiple times in one night, but it might just pay to step outside your comfort zone from time to time. ●

Nigel Dennis, CPP APMP Fellow, is a co-founder and director of BidWrite Pty Ltd. in Australia and the ANZ Chapter Chair. He can be reached at + *nigel@bidwrite.com.au.*

APMP's Body of Knowledge

The APMP Body of Knowledge (BOK) is an online wiki-type resource with hundreds of blue ribbon-approved articles and industry best practice resources that reflect APMP's global multi-industry membership of capture, bid, business development, and proposal management professionals.

The BOK is free to APMP members, and all members have exclusive online access to this vital tool. The BOK is presented in a universal, professional language that is not vendor or industry specific. To bolster its invaluable content, there is also a forum where members can comment on articles, engage with fellow APMP members, and aid in the development of future dynamic content.

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