

# Journal

VOLUME IV NUMBER II // 2016

*Your Professional Guide to Winning Business*



CAPTURE PLANNING  
AND THE CHAMBER  
OF PROPOSALS

BUSINESS DEVELOPMENT  
AND YOUR APMP CHAPTER

MANAGING THE  
CLIENT EXPERIENCE

WHY ETHICAL  
PROPOSALS MATTER

THE ACCIDENTAL PROPOSAL  
PROFESSIONAL

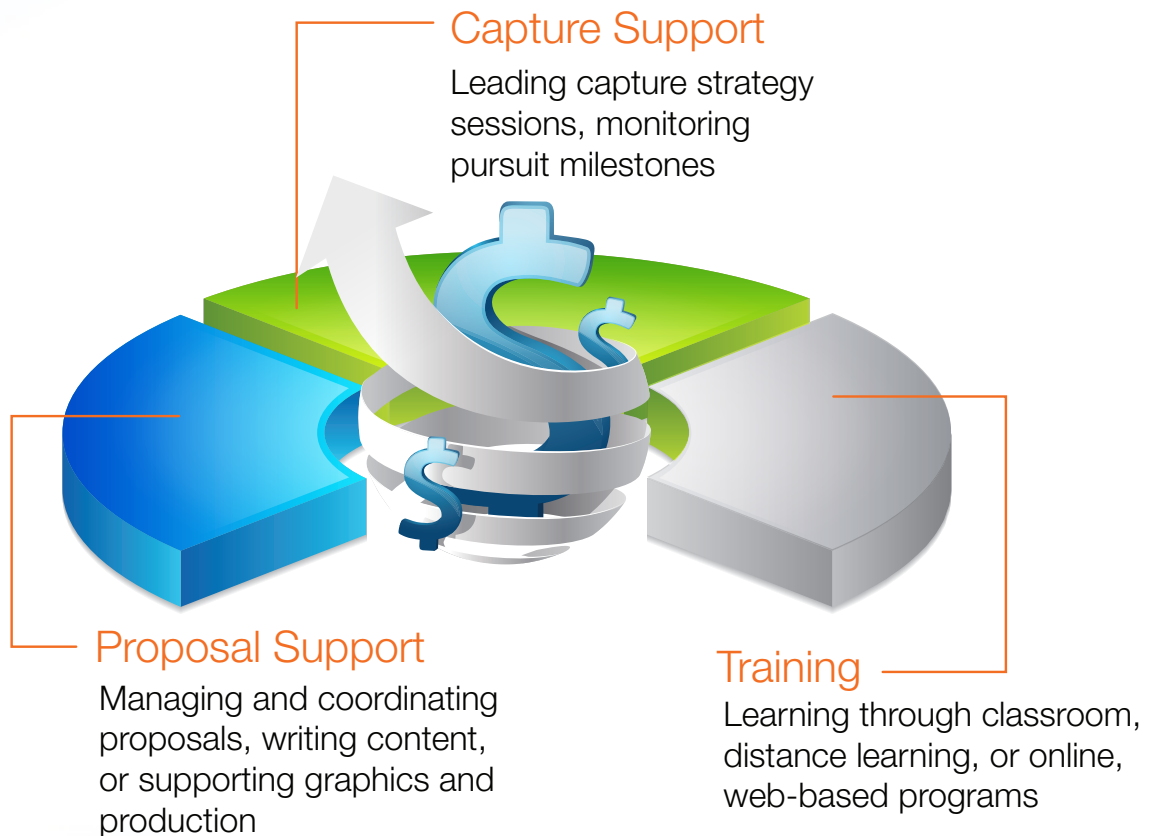


# CATEGORY MANAGEMENT

WHAT TO KNOW AND  
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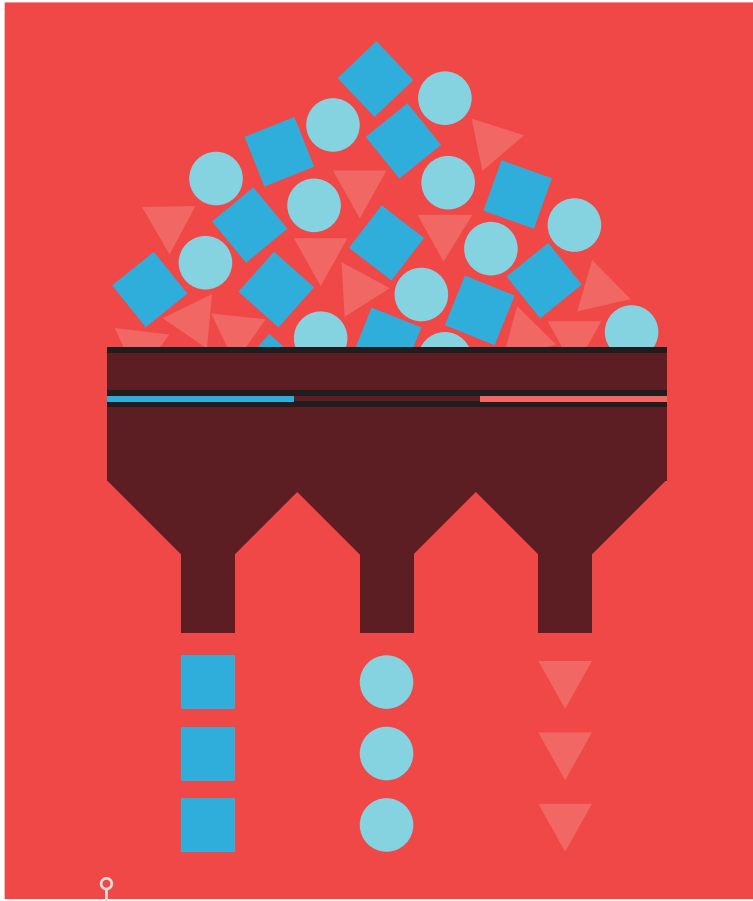
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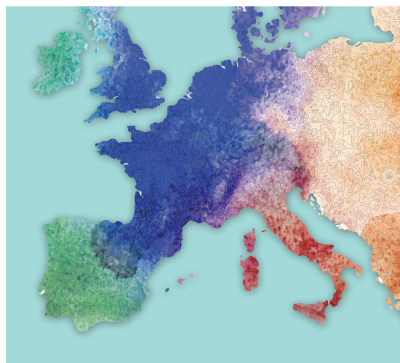


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### CAPTURING CATEGORY MANAGEMENT

This initiative is changing the way proposal professionals in the federal procurement space do business, and it's not likely to change course with a new administration.



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The profession of proposal management is often one that is happened upon, not sought out. Through networking and education opportunities, APMP helps to support and develop these "accidental" proposal professionals, while also creating an enticing industry to draw newcomers in.

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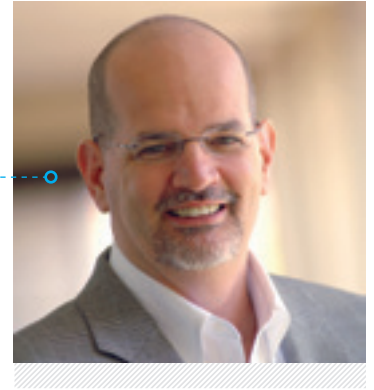
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## REFRESHING BID & PROPOSAL CON

**O**n June 13, 2017, APMP expects more than 800 bid and proposal professionals from every one of our industry's vertical markets to make their way to the Marriott hotel in New Orleans for the 2017 APMP Bid & Proposal Con. We hope one of those attendees is you.

As APMP continues to grow, so does the Bid & Proposal Con. That's why our board of directors is challenging our team to keep the content fresh for new and returning Bid & Proposal Con audiences.

Our attendance has increased 30 percent since the 2011 conference in Denver, and we have set new attendance records five out of the last six years. We've set these records because new people are finding our industry every year and want to be a part of our signature event. You may have noticed that we have been quietly creating sessions that members have requested and encouraging new speakers to take the microphone.

With our tremendous growth in Boston last year, we know we need to do more for our attendees.

A Bid & Proposal Con task force met at the conference in Boston last year and agreed that a fresh look is needed for New Orleans. The result: new content that industry attendees like you tell us they want to see, in the way they want to see it.

As you plan for APMP's Bid & Proposal Con 2017, get ready for these dynamic changes to your educational content:

**THE RULE OF THIRDS.** Next year, one-third of our educational content will be workshops, one-third will be panel discussions, and one-third will be traditional single speakers. This setup will allow the audience to fully participate in two-thirds of the educational content every day.

**A DAILY DEBATE.** Each day we will produce one session that allows teams of speakers to defend their positions. Naturally, we will ask the audience to participate and determine the winner.

**SPEAKING BY INVITATION ONLY.** You've been telling us that you want less PowerPoint and more discussion, so APMP is designing sessions that include fewer slide presentations and more of what you want.

We will still create access to great networking opportunities through the opening reception, mealtimes, and the awards ceremony, but we are ready to take your educational experience at APMP's Bid & Proposal Con to a whole new level of learning.

When planning your travel to APMP's Bid & Proposal Con 2017, June 13–15 in New Orleans, know that it is an investment in your career development, offering educational opportunities in the formats you requested. ●

**RICK HARRIS, CF APMP**

Executive Director

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# Best informed wins...

## Experts...

- Capture managers
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## Winning support...

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- Proposal management, writing, and review
- Professional training

## Professional training...

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- 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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## PAST ACHIEVEMENTS

### CEMENTING OUR FUTURE AS THE LEADING ASSOCIATION FOR BID, PROPOSAL, AND CAPTURE PROFESSIONALS

**A**s we near the end of another APMP fiscal year, it is a good time to reflect on our accomplishments and successes over the past year as we consider our future objectives. With one of my key objectives as APMP CEO being to increase professionalism in our industry, I am delighted that we have made significant progress in raising the professional profile of the association through our actions. This can be seen in the following key accomplishments.

#### KEY ACCOMPLISHMENTS

**A new APMP Body of Knowledge (BOK).** Written by industry professionals for professionals based on answers from an APMP member survey, the BOK includes the APMP Study Guide and is targeted to appeal to senior-level bid and proposal professionals.

***Writing Business Bids and Proposals for Dummies.*** A new book targeted to entry-level bid and proposal professionals, written by two APMP fellows with a focus on the B2B and B2C vertical markets, is globally available from APMP (for a member discount) and book retailers.

**An updated APMP Foundation-level certification exam.** Mapped against APMP's BOK, the exam now includes more questions. A planned review and refresh will now occur every five years.

**More webinars.** Over the past year, there have been 13 featured webinars averaging nearly 400 attendees

per session.

**APMP Bid & Proposal Con success.** With exceptional feedback on all aspects of the conference and location in Boston, the 2016 APMP Bid & Proposal Con attracted the highest number of attendees in the association's 27-year history, with 873 delegates.

**Increased number of member surveys.** Category Management two-question survey (200 responses); Top Educational Wants two-question survey (325 responses); APMP member survey (scheduled for winter 2016–17).

I encourage every APMP member to get involved at all levels across the association and help build the profile of our profession even more.

I have found my year as APMP CEO truly rewarding and wish Kristin Dufrene every success in her year as our 2017 CEO.

Please feel free to reach out to me at any time. ●

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# ASSOCIATION NEWS

## APMP PUBLISHES *WRITING BUSINESS BIDS & PROPOSALS FOR DUMMIES*

**W**ith APMP as the best-practices driver, the first bid and proposal book in the best-selling For Dummies line of reference books was released this summer. The book is geared toward individuals who are new to the industry or have little experience with proposal management. Readers will be introduced to the foundational skills they need to be successful as bid and proposal professionals, including developing a great proposal, planning an approach, using tools and templates, and much more.

APMP-certified experts and industry veterans created the book as a companion to the APMP Body of Knowledge and the Foundation Study Guide. The For Dummies book strengthens the core of APMP's educational resources and shares association-approved best practices with those outside the industry and the APMP community.

*Writing Business Bids & Proposals for Dummies* is published by Wiley and is available for purchase in the APMP store. ●

## THE COUNTDOWN TO THE APMP CAPTURE & BUSINESS DEVELOPMENT CONFERENCE

**I**n early December, APMP will host senior-level capture, business development, and proposal professionals for a one-day conference that focuses on building strategic relationships between industry and government. Sponsored by the APMP National Capital Area Chapter and supported by title sponsors Lohfeld

Consulting Group and Shipley Associates, the conference will feature engaging presenters who are active in the government capture and business development space. Attendees will learn when to bid (or not) in the absence of a capture effort and how to connect with the right government contacts. They will also receive an

update on category management. (See the cover feature on page 28 for more on this critical industry issue).

Registration is still open, and space is limited. To register for this event, visit <https://apmp.site-ym.com/page/cbdc2016>. ●

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# 5 stages

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

10 //

## CAPTURE

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

14 //

## BUSINESS DEVELOPMENT

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

18 //

## GRAPHICS + PRODUCTION

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

20 //

## PROPOSAL MANAGEMENT

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

# Capture Planning and the Chamber of Proposals

## HOW TO MAKE CAPTURE STRATEGY MAGIC

By Stephen R. Galati, D.M., CGW, CP APMP

**EXPECTO PATRONUM.** Known as the Patronus charm, this spell is perhaps the most famous and powerful of the defensive charms in the Harry Potter universe, but it is also one of the most complicated spells to evoke. When cast correctly, the spell produces an individual guardian, known as a patronus, to help defend against and conquer the toughest of opponents. Imagine such a spell for business development that, if conjured properly, could help defend against your toughest competitors and guide you to winning work. In the business development universe, your unique patronus is cast through proper capture planning. When it is done right, a capture plan is magical, providing valuable information and well-crafted strategies to weave into a compelling, winning proposal. Cast wrong, the capture plan is as useless as a defective magic wand.

### CHAPTER 1 THE CAPTURE PLAN THAT LIVED

An effective capture plan is a living document that is continuously updated to support the casual or direct incantations of your prospective client, the competition, and your team. Everyone involved with the opportunity adds to this strategic plan: the sales and business development groundskeepers, the key account and practice headmasters, the proposal witches and wizards, and the



marketing “dementors.” Regardless of the scars through the process, a true capture plan must live beyond these harsh encounters to transform into crafty magic for success.

### CHAPTER 2 CAPTURE QUIDDITCH

Like Harry Potter’s winning tactics at the game of Quidditch, capture planning requires a unified approach, teamwork, and unwavering focus. Keep your eyes on the contract and hands firmly on your business development “broomstick.” A winning plan involves having a team goalkeeper

who not only maintains the official plan but also adds any known facts about the proposal effort and every teaming partner role. A fleshed-out capture game plan always contains researched facts, team assignments, competitor analysis, and proposal endgame strategies. Do not forget to include all proposal wizardry assignments. The capture document should be used on every proposal kick-off and check-in call. As with any Quidditch match, capture planning involves staying aware of the shifting competitive landscape and dodging any competitor “bludgers.” Do your



best to recognize competitor tactics and build into the plan ways to dodge and counter their assaults.

### CHAPTER 3 THE RULES OF MAGIC SCHEDULING

As the strategic leader, you are the Minister of Proposal Magic. Similar to the rules of magic and the protective walls of Hogwarts, your proposal is contained and protected by explicit scheduling. Set firm deadlines and develop a schedule backward from the drop-dead date. Remember to always keep a 10 percent buffer for review, production, and any proposal goblins. Be explicit in your capture plan and, as the team's Minister of Proposal Magic, make sure your capture "coven" stays on schedule and remains focused on the capture strategy incantations.

### CHAPTER 4 CAPTURE SPELLS AND ENCHANTMENTS

A powerful capture plan spellbinds with competitor analysis. Pinpoint your team's strengths and weaknesses, and then do the same for your competition. Create contextual enchantment from this information by developing bewitching themes and counterthemes from the competitor analysis. These thematic points in tandem with the mimicking or *ghosting* of competitor strengths help create the winning capture strategy. However, beware the allure of dark magic. Sinister spells against competitors are unwarranted and will only come back to harm those that cast them. Also, do not drink the Analysis + Paralysis potion! Partaking in too

CAPTURE LEADERS HAVE SOMETHING SIMILAR TO HARRY POTTER'S DEATHLY HALLOWS, KNOWN AS THE PLANNING HALLOWS. THESE STRATEGIC HALLOWS ARE A TRIAD OF MAGICAL ELEMENTS THAT, WHEN USED TOGETHER, CAN PRESENT A MOST POWERFUL AND INDOMITABLE SOLUTION.

much competitor analysis will eventually convolute logic and paralyze even the most potent capture leaders.

### CHAPTER 5 THE PLANNING HALLOWS

According to the Oxford English Dictionary, *hallow* means to (1) consecrate or set apart as sacred; (2) honor as holy; regard or treat with reverence. Capture leaders have something similar to Harry Potter's Deathly Hallows, known as the Planning Hallows. These strategic hallows are a triad of magical elements that, when used together, can present a most powerful and indomitable solution. The Planning Hallows are: (1) the wand of collected information; (2) the ring of team communication; and (3) the cloak of proposal messaging. Individually, each magic element will strengthen the capture strategy; collectively, the Planning Hallows will make your capture plan strategy everlasting. Undeniably, a proposal witch or wizard using the Planning Hallows is a true Capture Master.

### CHAPTER 6 THE CURSED CHILD OF CAPTURE PLANNING

Do not be a cursed child of capture planning. Learn from your successes

and failures. Make each new effort your personal best and create your own special brand of capture strategy magic. Review any client debriefs and incorporate the lessons learned from client feedback. Make sure client capture plans remain evergreen through continuous updates before, during, and after your proposal effort finishes. Ensure the strategic capture plan remains a living document, breeding the progeny of new magic and thriving like the celebrated "boy who lived." On your next competitive effort, cast your own capture strategy patronus to spellbind your client and conquer your toughest competition. ●

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**Stephen R. Galati**, D.M., CGW, CP APMP, is the director of strategic proposals for TRC, an engineering and consulting firm. He has been casting proposal and technical communications magic for more than 20 years throughout the United States and on global opportunities. He is the author of *Geographic Information Systems Demystified*, a textbook published by Artech House, and has numerous publications to his credit concerning environmental consulting, proposal writing, grant management, and public/private funding. He can be reached at [+sgalati@trcsolutions.com](mailto:sgalati@trcsolutions.com).

READY, SET, GO

# Preparing to Bid Like an Olympian

## TAKE CUES FROM THE WORLD'S GREATEST COMPETITORS

By Graham Price, CF APMP



**THE ATHLETES OF** the 2016 Summer Olympics in Rio displayed incredible feats of strength and stamina. One word consistently came to mind when watching emotional, overwhelmed athletes being recognized at their medal ceremonies: preparation.

Athlete after athlete—cyclists, divers, runners—thanked their coaches and families for their support and understanding. These athletes have spent many years preparing for this moment—training long and hard to be in the best physical shape with their muscle memory honed and ready to go. Eating clean and fueling their remarkable bodies with the right nutrition to be as strong and efficient as possible. Studying their competitors to devise strategies that will let them take the tape and the glory of a medal.

As proposal professionals, we may never feel the weight of a gold medal, but we can look to these

Olympic heroes to learn some lessons in preparation. If bidding is the 100-meter dash, the capture phase represents the weeks and months of preparation required to arrive on the starting line as the favorite to win.

There are three critical questions to ask your sales team that will set you up for victory:

### 1 WHO ARE THE KEY INFLUENCERS AND DECISION MAKERS IN THE ORGANIZATIONAL HIERARCHY?

At face value, this may seem a simple question, but depending on your customer's sector and federal or commercial status, the answer may not be as simple. Identifying the evaluators and key decision makers is crucial to developing a winning bid.

### 2 WHAT DO THEY WANT FROM THIS EXERCISE?

Understanding what drives the decision makers can be the difference between a proposal that sings and

one that squeaks. Whether the decision makers want to boast about cost savings or explore new innovations and ways of working will decide the best framing and presentation of the proposal. Do they want to remain involved, with sleeves rolled up to make it work, or do they prefer to be uninvolved, with all the hassle taken away from them? Knowing the difference is vital.

### 3 WHAT DOES YOUR COMPETITION KNOW THAT YOU DON'T?

Knowing just the basics of the competition's products and offers isn't enough. How do they spin what they do, and what techniques can be used to edge them out? By establishing where the gaps in your knowledge are and mapping your competitors' comparative advantages, you can plan a thorough strategy that leads to a win.

Once you identify the decision makers, what drives them, and where you sit in comparison to your competition, you can use that knowledge—combined with the intelligence you have accumulated through capture planning—to develop targeted, tangible win themes that will strike a chord with buyers.

At this point, you are ready to rise out of the blocks ahead of the field. Medals await. ●

---

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# Business Development and Your APMP Chapter

## CREATING OPPORTUNITIES FROM ASSOCIATION

By Amber Hudson, CP APMP

**MOST MEMBERS UNDERSTAND** the benefits that come with APMP membership and how they can positively influence professional standing. However, some may not be aware of the valuable benefits and educational resources offered by their local chapters. Engaging with your local chapter creates business development opportunities through professional networking and increases local association awareness to help you get the most from your APMP membership.

### SEEK OUT CONNECTIONS

Local chapter networking events are like APMP Industry Days. Plan to attend as many events as possible to explore the diverse groups of people and companies. You may find a competitor, a teammate, and an unexplored business opportunity all in the same person. Before the event, research your chapter on LinkedIn or its website to see what industries and companies the attendees represent. Decide whom you may want to connect with based on a niche or capabilities you have in common. Exposure for your company and your expertise is your greatest facilitator for forging new opportunities.

### PARTICIPATE AND LEARN

Although proposal professionals come from many different companies that serve customers spanning hundreds of industries, all face the same challenges in business development

and proposal writing. Your APMP chapter is prepared to help you make the right connections to ensure your proposal management success. Volunteer at chapter events to meet with people you may not usually connect with. Ask questions and keep up with industry trends through your chapter's LinkedIn group or website forum. Also, be sure to share your own successes to help others! APMP chapter board members are readily available to serve as mentors for APMP certifications and to provide valuable input on additional professional development opportunities.

### BE AN IDEA GENERATOR

Your suggestions for events or training topics are always welcome. Use this as an opportunity to benefit both your company and your personal professional development.

- **Speakers.** Whose story are you interested in hearing or supporting? Suggest a speaker from one of your potential local customers or a large organization your company is interested in doing business with.
- **Training Topics.** Suggest lunch-and-learn sessions on topics you or your company could use further development in. Pursue training on protests if your company is exploring one for the first time. Ask if someone is willing to share their experiences from a larger conference,

like the national APMP Bid & Proposal Con.

- **General Presentations.** What large opportunity or customer are you targeting in the near future? If your company is interested in a contract that covers many different technical competencies, suggest your chapter host a gathering to share or find information, identify teammates, or discover competitors. A neutral party (someone whose company isn't interested in the opportunity) may be willing to facilitate.

Presenting to your chapter what information and opportunities your company may value gives you the chance to learn from a larger, potentially more knowledgeable group. Chances are, you aren't the only one interested in that information.

APMP was created to connect the industry's professionals, and local APMP chapter success relies on member participation. Support the organization and yourself by being an active member and using your local chapter to expand your network, connect to valuable resources, and gain targeted benefits. ●

**Amber Hudson, CP APMP**, is a proposal writer for CDI Corp. and is the hospitality chair of the APMP Tidewater Chapter serving Hampton Roads, Virginia, and Northeastern North Carolina. She can be reached at [+amg5180@gmail.com](mailto:amg5180@gmail.com).





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# Managing the Client Experience

## CREATING CONNECTIONS AND WINNING PROPOSALS

By Kevin A. Switaj, Ph.D., CF APMP

**TO BE SUCCESSFUL** in modern business, companies cannot just sell a product or a solution; they need to give customers a reason to choose them over someone else. Proposal professionals need to ensure that the entire proposal life cycle is mindful of the customer/client experience, a business concept that focuses on maximizing each interaction. Prioritizing the client experience leads to long-term success.

### CONNECTIONS ARE ABOUT VALUE

Many recognizable brands take the customer experience to great levels. By doing so, these companies create

clear value over their competitors. Disney makes entire resort stays an experience for their guests, from transportation on the Disney Magical Express to themed rooms to highly attentive cast members whose only goal is to create memories. Communication company Slack designed its business-oriented messaging system to “be fun, thoughtful, humane, whimsical, and erudite.” Shake Shack charges double for its food what other fast-food restaurants do because it offers high-quality ingredients, a modern dining area, and exceptional customer service.

These kinds of customer-centric connections translate directly to proposal development. To achieve the level of trust needed to procure a win, the proposal team must show passion, and the proposal itself needs to evoke an emotional connection with the evaluators.

Making an emotional connection with an evaluator may seem like a tall order. However, the proposal developers need to create that connection from the beginning. Based on hot buttons and pain points identified in the capture process, the proposal should address the needs, issues, concerns, and aspirations of

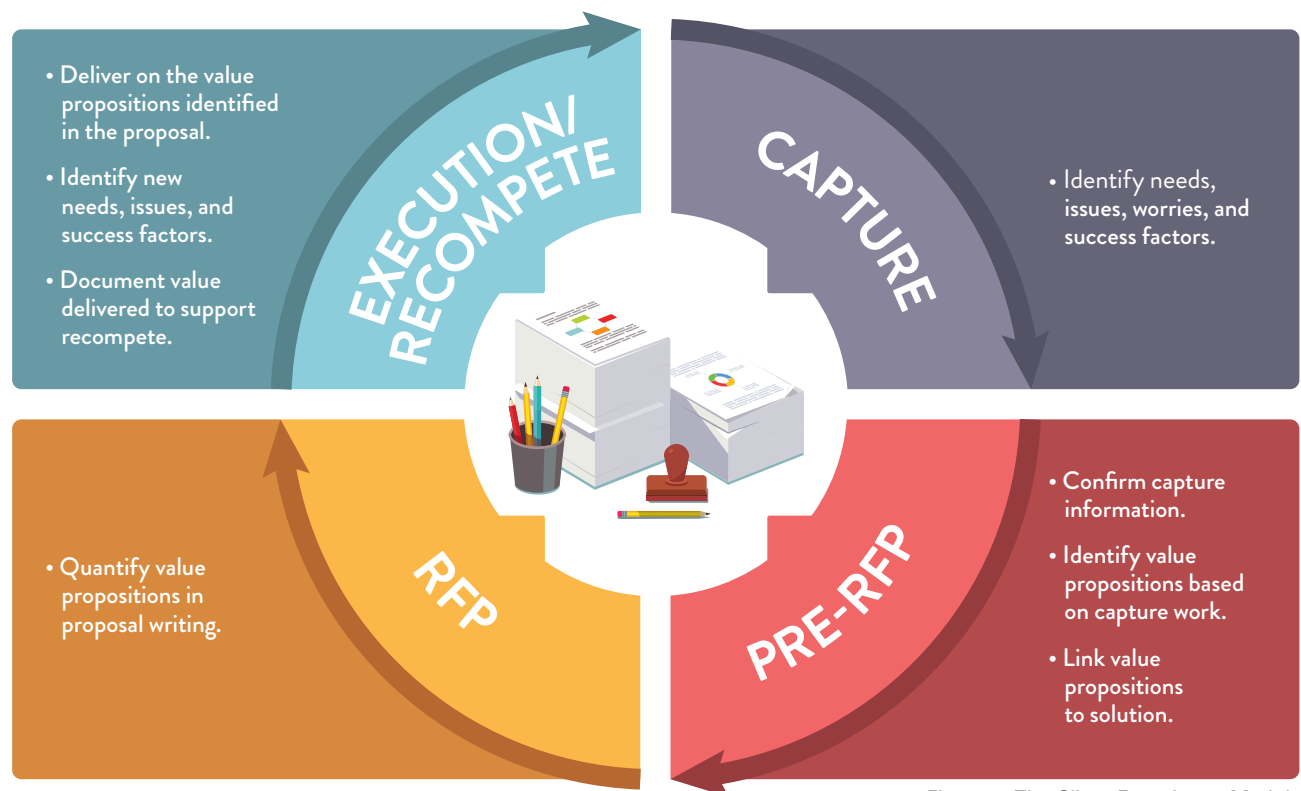


Figure 1: The Client Experience Model

the client and show how the offeror can be a strong, supportive partner. By speaking to those specific needs and mitigating fears with well-crafted solutions, the proposal can instill familiarity and comfort.

#### **CREATING CONNECTIONS IN PROPOSALS**

Using the same client intimacy information gathered in the capture phase, the bid team must design a solution that delivers value through a viable, low-risk approach. Throughout each section, the proposal should address the requirements but also clearly link the method and solution to the client's needs. More importantly, the benefits should be clearly articulated and quantified specifically for the client.

Proposal best practices already provide an approach to articulating features and benefits, but proposal professionals often have difficulty translating this approach to inexperienced team members. Focusing on the capture and pre-RFP phases as the beginning of the client experience model can decrease the learning curve for these proposal professionals, setting the stage for a successful proposal delivery and partnership. (See Figure 1.)

#### **BUILDING PARTNERSHIPS**

People remember emotional connections. Successful companies focus on making those connections each time they interact with their clients. Proposal teams must identify

the needs and concerns of the client, develop a solution that meets or exceeds those needs, and quantify the client-specific value of that solution. Following this process will make the proposal stand out and speak to the evaluator, leading to not only a win but also a mutually beneficial partnership. ●

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# Format Files

## BEING AWARE OF YOUR MEDIUM

By Todd B. Rudy



### WITH REQUIREMENTS CHANGING

from one bid to the next, it's important to keep in mind the medium you'll use to submit your proposal while you're developing it—whether it's an electronic version or a hard copy. Some clients might require both: an electronic submission on the due date followed by a hard copy express delivered to their office. Outlined here are five common elements to consider when developing proposals in either—or both—formats.

### PROPOSAL SECTION LABELS

PDFs allow for the creation of various levels of bookmarks within the document that help the reviewer easily navigate the proposal sections. Printed versions, however, require another way to simplify reader navigation. Numbered tabs placed throughout a printed document allow a reader to flip easily to a particular section, but there's another option that brings electronic and printed media together—fly pages. As you create and compile documents on your computer, include a single page that boldly introduces each new section, such as FINANCIALS or SCHEDULE. In the PDF version, this format clearly announces a new section to anyone scrolling the document; in a hard copy, the fly pages can be easily replaced with tabs. Be sure fly pages follow the formatting or style guidelines required by the RFP and your organization.

### LEFT-HAND MARGINS

Page-count limitations can pose a challenge. As a result, margins and spacing are often the first document elements to be played with, sometimes page by page, to squeeze as much content as possible within the limits. However, when margins are decreased, a logo at the top or a page number at the bottom may come dangerously close to the print edge. A half-inch margin may look nice on the computer screen, but when your document is printed, the three-ring binder holes may go right through your text. Leave a full inch margin on the left to keep your pages safe from hole punches and spiral binding. If you're really struggling to stay within the page count, it's probably time to start revising.

### ORGANIZATIONAL CHARTS

Some proposal developers like to use graphics programs like Visio to create organizational charts, but these programs can limit your ability to see what the final product will look like when it's printed. If a 30-position chart in 8-point font needs to be printed, issues may emerge: The text may be too small to be legible, or the chart may render on the page as 4 inches high and 14 inches wide, outside the range of a standard page. Before sending the final work to the printer, preview the chart with the chart developer to ensure it meets legibility and formatting expectations.

Test the page on the paper size it will be printed on.

### PROJECT SCHEDULES

Similarly, a detailed schedule that is readable on a single page on the computer screen is often completely unreadable in print. Hard copy submissions should include a schedule printed on a plotter as well as an electronic version on a CD or USB flash drive tucked into the binder's front pocket, which ensures each version is usable no matter how the reviewer accesses your schedule. Consider working with your IT team to develop a QR code to print on the hard copy version. Proposal reviewers can scan the code with their smartphones and access a digital version of the schedule without needing to plug anything in to a computer.

### PREPARED PROPOSALS

There is a good chance that at least a portion of any electronic submission will be printed at some point. Whenever possible, create an electronic version that you assume will be printed—with fully legible schedules, clearly rendered organization charts, one-inch margins, and fly pages dividing the sections. That way, your proposal will always be prepared for any reviewer in any medium. ●

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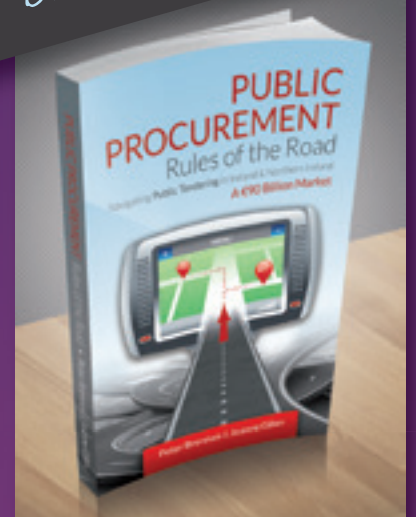
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# Tackling Technical Specifications

## PUTTING THE POLITICS INTO PROPOSALS

By Laura Ford, CP APMP



Don't be afraid to challenge your teammates and ask why. Be that child who constantly questions and demands a reason for everything. If your internal stakeholders don't have robust and valid responses, how are they going to be able to answer the client's questions, no matter how difficult they are? Ultimately, they will be better prepared.



**POLITICIANS WHO CAN** capture a key and emotive message surmised from a 750-page technical policy tome are impressive. Whether it be within a manifesto, a speech, or an interview, the message always seems to be short, clear, and intended to resonate with a vast sector of the population. Not many voters would be happy to receive a copy of the Political and Constitutional Reform Committee's Eighth Report of Session 2014–15 to try to persuade them to vote for that party. So, how do politicians do it? They are, after all, working to sell their ideas and policies to the electorate, their most valued customer base.

Politicians have vast support networks of communications teams, strategists, and writers. Bid managers, however, are often left on their own to include lengthy technical product specifications succinctly in a

proposal. What most stakeholders in the bid team don't realize is that it's not an easy task. Bid managers are removed from a client's day-to-day business, and that poses a challenge: If they don't understand the technical aspects of the content, how can they present it in a way that makes sense to the client in the proposal?

Stakeholders often assume that those who will be reading proposals are like-minded people, technical experts with the stakeholders' same level of understanding. While it's true that the evaluation panel may include some technical experts, it is likely to also include members from broader business areas, such as human resources, legal, procurement, and strategy.

This diverse audience means it is important to write proposals that

the whole panel can understand and connect with.

### POLITICIAN'S TOOLS IN ACTION

Consider this scenario: It's Tuesday morning, and, as agreed following the kick-off meeting, the technical specifications that form the basis of your proposed solution to a new client are waiting in your inbox.

Here's how to tackle this task, just as a politician might take on a dense report in preparation for a public briefing or stump speech:

- Read through the technical specifications completely once.
- Highlight the sections that don't make sense.

- Liaise with the product manager for explanation and development where necessary.
- Edit and summarize the content where appropriate, including identifying benefits.
- Feature the benefits in relevant callouts and introductions.
- Review the updated version with the salesperson and the product manager to ensure the content and messaging remain accurate and relevant.

It's now Friday afternoon the following week. The proposal has been submitted, and the team is gathered for a post-submission learning review. Looking back over the

numerous iterations of your proposal, you and your team are satisfied that the content was sufficiently reworked to resonate with the client while still presenting critical details.

Using this process will help you create a document that is clear and informative and conveys the primary message.

It is important for politicians to be informed and to be thoughtful with their words. Bid managers should do the same. ●

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## Once More, with Feeling!

Incorporating technical specifications content is challenging enough, but making it engaging is another effort altogether. Politicians are well versed in working to the ethos of voters; bid managers should keep these goals at the forefront when crafting proposals.

- **Impact.** Condense the story into just one sentence or a few words. It's not easy, but it will give your proposal more prominence.
- **Empathy.** Identify with your clients: Understand what makes them happy, sad, confident, frustrated.
- **Connection.** Use language that is relevant to your clients. Convey a sense of your collective aims and mutually shared paths.
- **Emotion.** Consider using loaded language for maximum resonance, aligning to your clients' feelings and how they interact with their business environment.

# Why Ethical Proposals Matter

“ETHICS IS KNOWING THE DIFFERENCE BETWEEN WHAT YOU HAVE A RIGHT TO DO AND WHAT IS RIGHT TO DO.” –POTTER STEWART

By Gareth Maritz



## THE BASICS OF PROPOSAL ETHICS

- Use simple language that is easily understood by a wide audience.
- Avoid superfluous adjectives and creative language.
- Be honest and concise.

WHILE CREATIVE USE OF LANGUAGE AND PRESENTATION OFTEN ENSURES A SUCCESSFUL BID, BEING HONEST AND OPEN CAN REAP MORE REWARDS.

**BID AND PROPOSAL** professionals are faced with the arduous task of doing all they can to prepare a winning proposal, because, let's face it, securing new business is why employers invest in these roles. These individuals are measured against their success, but sometimes winning isn't everything. In fact, doing the right thing is more sustainable for them and their companies. As Robert C. McMurrian said, sometimes doing the right thing is just better business.

## A CASE STUDY IN ETHICS

Ethical concepts are subjective and vary depending on geography, culture, and the situation. Here's an example of a scenario in which ethics can materially affect a proposal in the real world.

In a recent request for proposals in the technology field, the award criteria included a question related to the delivery of the solution. The question was not well worded, and a creative bidder could avoid giving specific delivery dates by using language such as “immediately available from our warehouse,” suggesting to the client that the solution was, in fact, immediately available.

One bid team elected to be honest and open about the delivery of the solution in its proposal. A competitor decided to use the language mentioned above.

The tender was awarded to the competitor. However, when the

client tried to order the solution, the client learned the truth about its immediate availability. As a result, the client canceled the agreement. After the previously selected provider could not deliver the solution as promised, the tender was awarded to the bid team that had been honest in its presentation. This team was confident it would be able to deliver on the promises of its original tender and bid.

While creative use of language and presentation often ensures a successful bid, being honest and open can reap more rewards. If you are winning bids in a dishonest way, there is a strong chance you could alienate your customers and destroy your business's reputation, which is obviously not good for business. Presenting bids in an honest and ethical manner will reap the best rewards in the long term. Your company will become known as a dependable one that honors its obligations and presents bids that are truthful and deliverable. ●

---

**Gareth Maritz** is an account and bid manager in the technology sector, involved in public and global bids. He holds a law degree and is presently an MBA candidate at the University of Leicester. He is a member of APMP, the Project Management Institute, the Chartered Management Institute, and the Association of MBAs.



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# Commercial



## The Not-So-Small Job of the Small-Business Proposal Professional

Jennifer Mosier, CF APMP

There is no “I” in team until you become a valued small-business proposal professional. In commercial businesses, very small companies have limited resources. That’s where the “I” comes in. Typically, one person is responsible for all aspects of developing proposals, including graphics, content writing, and production—and sometimes even contract language and teaming negotiations. It all can be done by a team of one, but establishing processes and procedures is necessary for success.

### MANAGING CONTENT

Small businesses submit many proposals in short spurts. Writing customized content from scratch for each proposal submission is not conducive to quick turns or multiple responses in a short time frame. Create service-specific content files that detail your service offerings with placeholders for clients’ names, hot buttons, and concerns. With creativity, it is possible to tailor your content around the needs of your clients. Include differentiators that make the company or product stand out from the competition. Organize

your files in a repository so you can easily access them when needed. Several types of repositories exist: from simple desktop filing systems to cloud- or server-based systems. Cloud-based systems are inexpensive and work well for small businesses with geographically dispersed team members. Take the time to research what will work best for your organization and tailor a system to meet the needs of your staff.

### GRAPHIC CONTENT

For proposal managers who have had no formal graphics training, there are beginner-level tools available. Mike

Parkinson’s e-book *Do-It-Yourself Billion Dollar Graphics* includes a library of 200 editable graphics—sure to get the novice graphic artist with limited resources started.

To further develop graphics skills, Pluralsight (formerly known as Train Simple) offers courses on a wide array of Adobe products, covering graphic design basics to advanced instruction. Courses are recorded in short increments, allowing you to easily return to specific points later, and your progress is tracked. The courses include samples to download so you can follow along during the step-by-step training sessions.

### PUT TIME ON YOUR SIDE

The team of one is consistently managing multiple proposals, deadlines, and calendars. Just as you need a content repository, you need a repository for tools and templates. At a minimum,

there should be a calendar to input reviews, milestones, and deliverables; a writing template with corporate colors and styles; a résumé template (and a résumé for each staff member tailored to this template); and a past performance or case study template for each completed project. Being able to quickly access these tools and templates will greatly impact the speed at which you can respond to an RFP.

**REMAIN RELEVANT**

Networking is a vital part of small-business development, and that stays true for the proposal personnel in those businesses. Education on the latest trends and technologies for proposal professionals is available through a variety of resources. Join

a local APMP chapter for in-person networking or attend relevant webinars to increase educational resource availability and contacts within the community. Connect with industry experts on social media. Read articles, ask questions, submit ideas, and get involved. It is important that you keep up the skills to manage and develop proposals for small teams.

**TAKE A BREAK**

The truth is proposal professionals get burned out. In this business, time off is not a luxury but a requirement to remain a dependable proposal employee. Taking time off is much easier said than done with deadlines always looming, however. Use all your earned paid time off. Ask if there is

comp time for extra and overnight hours worked. Take a long weekend if an entire week off is not feasible due to deadlines. Rest and recover. Small-business leadership will be thankful for a refreshed and re-energized proposal professional. ●

**Jennifer Mosier**, CF APMP, has more than 15 years of experience managing, writing, and contributing to proposal development efforts. She sits on the board for the APMP Florida Sunshine Chapter as publicity chair and is a senior proposal manager for World BioHazTec Corp., a certified small woman-owned business specializing in biosafety consultation, training, and facility certification services. She can be reached at + [www.apmpflorida.org](http://www.apmpflorida.org).

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# Federal



## The Influential RFP: A European Perspective

By Ghim Meng (Jimmy) Low, CF APMP

Not all RFPs are created equally. The way RFPs are constructed influences how bid managers respond to them. European Union public procurement RFPs add another dimension: strict compliance with the respective national public procurement laws. Here are some facets of the EU process and procedure to consider.

### OPEN PROCEDURE VS. COMPETITIVE PROCEDURE WITH NEGOTIATION

An *open procedure* is a call for competition to all interested parties. There is no limit to the number of proposals the contracting party may receive. This type of procedure is common when the contracting party is seeking the lowest price bidder. *Competitive procedure with negotiation* is a two-stage call for competition. The first stage—the beauty contest—includes pre-qualification questionnaires that are sent to a minimum of

three qualified parties, who are then invited to the second stage—the request for proposal. In the second stage, the qualified parties submit their proposals and may be further narrowed, invited to negotiation, or requested to submit a revised offer.

Besides the usual bid/no-bid qualification, consider how your proposal could be perceived in an open procedure tender. Are you the strongest competitor for the services? Are you willing to negotiate lower prices? Open

procedure tenders give you only one chance to make an offer. In most cases, price tends to be the deciding factor.

### PRE-QUALIFICATION QUESTIONNAIRES

The process of submitting a pre-qualification questionnaire is common to both procedures, as it serves as a check on the bidding parties' financial, technical, and other capabilities to deliver and operate the tendered scope.

Take extra care in preparing these questionnaires, especially when customer references and certifications are requested. Finding equivalent references that match the tendered scope can be tricky, as it mandates a thorough understanding of the requirements.



# EU Public Procurement Laws

The European Union is made up of 28 member countries and is structured as a single internal market through a uniformed system of laws that apply to those members. As a supranational political-economic entity, the EU has powers and competencies in setting laws. According to the governing body, the European Commission, EU public authorities spend about 14 percent of the EU gross domestic product on the purchase of public services, works, and supplies. For more information about EU public procurement strategy, laws, and implementations, visit [https://ec.europa.eu/growth/single-market/public-procurement\\_en](https://ec.europa.eu/growth/single-market/public-procurement_en).

In 2014, three new EU directives on public procurement were issued. An EU directive, as opposed to an EU regulation, must be transposed and implemented into respective national laws to be effective. Germany was one of the last EU member countries to implement these directives, on April 18, 2016.

## THE NEW EU PUBLIC PROCUREMENT DIRECTIVES INCLUDE:

- Directive 2014/23/EU for concession contracts.
- Directive 2014/24/EU for public services, works, and supplies.
- Directive 2014/25/EU for energy, water, transport, and postal services sectors.

EU directives establish what result must be achieved, but the implementation methods are left to each country. Although the differences in implementation may be minimal among EU countries, they pose challenges for bid managers dealing with public procurement tenders across the EU.

## STRICT FORMALITIES AND VARYING REGULATIONS

Unlike “classic” proposals or nonpublic procurement tenders, public procurement tenders focus heavily on technical formalities and compliance. An evaluation criteria catalog, part of the tender documents, lists must-have and nice-to-have requirements. Handle the catalog with extra care—this is a potential landmine where many bidders are disqualified. Seek clarification through bidder questions to eliminate doubts and narrow the possible options.

Be familiar with the respective EU country’s public procurement laws and regulations. For instance, in Germany, the EU public procurement laws are implemented partly in the Act Against

Restriction of Competitions (Gesetz gegen Wettbewerbsbeschränkungen; GWB) and four subregulations.

Public spending on services and supplies is a large business-to-government market. To be successful, bid managers must be equipped with a different set of skills—mastering the public procurement laws and their intricate regulations and procedures. ●

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CAPTURING  
**CATEGORY  
MANAGEMENT**

# THIS INITIATIVE IS CHANGING THE WAY PROPOSAL PROFESSIONALS IN THE FEDERAL PROCUREMENT SPACE DO BUSINESS, AND IT'S NOT LIKELY TO CHANGE COURSE WITH A NEW ADMINISTRATION

By Justin Gensing

The United States federal government is, by its own calculation and assertion, the single largest purchaser of goods and services in the world. In 2015, its estimated annual spending was roughly \$450 billion. That's a large outlay, and many companies rely on those purchases for most or all of their revenue. Lockheed Martin, perennially one of the top recipients of that federal spend, took in more than \$44 billion in 2015 alone, according to the Federal Procurement Data System's Top 100 Contractors Report for that year.

The government spreads those purchases to a much wider range of companies than a handful of behemoths like Lockheed Martin. According to the U.S. Small Business Administration (SBA), the federal government spends roughly \$100 billion per year in sales to small businesses.

With so much money at stake for so many businesses, it's significant when the federal government contemplates shaking up its procurement process. So in early 2014, when the General Services Administration (GSA) announced a major shift in those processes toward the concept of category management, more than a few hackles were raised.

## BREAKING DOWN CATEGORY MANAGEMENT

As explained by the GSA in its 2014 announcement, "category management essentially looks at product or service categories the way a business might look at its own strategic business units, and then works on customizing purchase channels to better meet customer needs and market demands. Category management also provides deep-dive market analysis that addresses supply chain management." The GSA lists five key areas of focus for category management:

- Optimizing contract vehicles and managing the landscape.
- Managing data collection and analysis.
- Leveraging supplier relationships.
- Maximizing customer relationships.
- Growing and sharing expertise.

The idea is not new. Category management has been used in the private sector for years to help manage

expenditures and more closely evaluate a business's network of suppliers. The objective is to increase efficiency and effectiveness while reducing costs and redundancies. It doesn't make sense, for example, for a furniture manufacturer to purchase wood from 10 different suppliers providing products of varied quality and cost.

Even within the federal government, category management isn't an entirely new concept, according to Roger Waldron, president of the Coalition for Government Procurement, which advises commercial service and product companies selling in the federal market. "To put it in context, category management is the next iteration or an evolution from what was previously the Federal Strategic Sourcing Initiative."

"As a concept, it makes a lot of sense," said Lisa Pafe, vice president of Lohfeld Consulting Group and 2016 president of APMP's National Capital Area Chapter. "I don't think people have concerns with the concept or the goals—efficiency and saving money."

## GROWING CONCERNS

Those companies engaged in selling goods and services to the federal government have been watching the recent developments toward category management with a healthy dose of anxiety. "There are probably very few incumbent contractors of any size that would expect to benefit from category management," said Russell Smith, APMP past president, current chair of the Presentation Committee, and president of Organizational Communications Inc.

The reason for this anxiety is simple: Fewer contracts mean fewer contractors. Smith offered a simple example: "Let's say the government is currently buying Product A under 20 different contracts. As a result of category management being implemented, the government may purchase this product under only five contracts. So what happens to those other 15 contractors?"

The answer, of course, is that those 15 contractors are out of luck. And while most businesses would ideologically agree with the premise that those businesses that are able to provide the highest quality, best service, or lowest cost should be rewarded with contracts at the expense of their less proficient competitors, the bureaucracy and red

tape necessary to implement category management on a \$450 billion scale means the best companies might not necessarily win the job.

“The issue isn’t with the overall concept of category management,” said Pafe. “The issue is with how it’s being implemented. There could be contractors who get locked out either because they couldn’t qualify to compete at all due to the high bar or because they submitted a proposal and weren’t selected. They can be locked out of the market for five to 10 years. That can drive a lot of companies out of business.”

Even a seemingly small omission or failure to comply with a relatively minor provision can mean being excluded from huge parts of the procurement process. This is especially a concern for what are unofficially known as “middle tier” companies. Pafe explained that small businesses receive special treatment in the federal procurement process; according to the SBA, there is a goal that 23 percent of prime contracts for federal executive agencies are awarded to small businesses. However, determining what qualifies as a small business varies by industry.

This means that there are a large number of middle-tier companies that aren’t afforded the protections offered to small businesses but lack the resources and sophistication of large corporations like Lockheed Martin or General Electric. “It’s already very tough for mid-tier companies to compete, with the way the market is now,” said Pafe. “The larger companies have the breadth of experience and ability to put together sophisticated proposals.”

### ADDRESSING THE LACK OF AWARENESS

As potentially significant as the implementation of category management could be for businesses engaged in federal procurement, Smith has been surprised by the lack of awareness exhibited by many in the industry. “I wasn’t aware of the category management initiative until about eight months ago,” he said. “In spite of the fact that [former GSA deputy assistant commissioner and present industry consultant] Mark Day has said category management is going to be rolled out in the next three or four years, I believe industry isn’t as aware of this as much as it should be.”

Over the summer, APMP hosted a government panel to discuss these changes, and there was surprisingly little attendance by those who will be impacted, according to Smith. On the other hand, Waldron said he thinks “people start to pay attention when they see how it impacts their opportunities to compete.” He added, “The folks at the Coalition for Government Procurement are very aware of category management,” noting that his organization has hosted individuals central to category management’s implementation in the United Kingdom’s government.

### AWAITING A NEW ADMINISTRATION

In the United States, category management is still in the early stages, and many in the industry are uncertain as to its future, particularly with a new administration taking office next year. Pafe doesn’t believe traditional politics will play a significant role in category management’s future. “Even if there’s a change in administration from Democrat to Republican, it’s not like category management can just go away at the snap of someone’s fingers. If someone in a new administration said, ‘We don’t want to do this anymore,’ it would take years to undo what’s already been done. People need to understand that the world of federal contracting is shifting away from individual procurements to these multiple-award contracts, and that’s not going to go away.”

While agreeing that a new administration isn’t likely to completely abandon category management, Waldron believes it will probably evolve differently. “There is going to be a whole new set of folks at the Office of Management and Budget, and the procurement leadership will be different. They will want to put their stamp on operations as well.”

Smith doesn’t see category management being abandoned with a new administration either; however, he does believe the ultimate implementation will be less robust than originally envisioned by its champions. “The more probable outcome is that category management will be barely implemented or half implemented or weakly implemented,” he said. “Over the past 16 or 17 years, there have been a couple of initiatives that were supposed to be implemented governmentwide,” offering the example of performance-based service contracting, which the federal government itself has acknowledged to be a challenging implementation. “Old hands that have been in government a long time point to initiatives like that. If you’re a fan of the whole paradigm of category management, that’s your fear—that it’ll never achieve the huge role that the proponents think it will.”

### STAYING TUNED IN

Regardless of the ultimate extent of category management’s implementation, those with experience in government procurement agree that businesses engaged in this market need to watch the development closely. “These businesses definitely need to be informed and provide feedback and input to the government wherever they are asking for it,” said Waldron. “It seems to me the federal government is still trying to get this up and running to a large extent. That’s why you see a lot of these rules just getting finalized.”

“I think there will be change,” Waldron added. “At the end of the day, this is the age-old issue in the federal government of a more centralized approach to procurement management versus a more decentralized approach.

# APMP National Capital Area Chapter Takes Charge

Most APMP members in the Washington, D.C. area are involved in the federal contracting space, so the National Capital Area (NCA) Chapter has made category management a top-billing issue. Throughout the past year, the NCA Chapter has covered category management at its events and in its e-zine, *Executive Summary*. “Our events allow members access to not only industry experts but also top procurement officials,” said Chapter President Lisa Pafe, vice president of Lohfeld Consulting Group. “Part of these programs is educating people about what category management is, and the other part is bringing in the federal procurement officials who can answer their questions.”

## **TWO OF THE CHAPTER’S SPEAKER SERIES EVENTS THIS YEAR FOCUSED ON CATEGORY MANAGEMENT:**

- In April, the event focused on the Alliant 2/Alliant SB 2, the General Services Administration’s Governmentwide Acquisition Contract (GWAC) that focuses on IT solutions. The event was moderated by Roger Waldron. The speakers included Casey Coleman, group vice president of Unisys Federal Systems Civilian Agencies; Arun Sankaran, managing director at Govini; John Johnson, former GSA commissioner; Ellis Kahn, program leader of the strategic vehicles team at Booz Allen Hamilton; and Jeff Hamilton, president of Quality Technology Inc.
- The category management Speaker Series in July was a holistic discussion moderated by Jason Miller, executive editor of Federal News Radio. The speakers included Lesley Anne Field, deputy administrator for federal procurement policy at the Office of Management and Budget; Laura Stanton, assistant commissioner of the Office of Strategy Management in Federal Acquisition Services at the GSA; and Ken Brennan, deputy director of services acquisition in the Department of Defense’s Office of Defense Procurement and Acquisition Policy.

In addition to hosting its own events, the chapter is one of the co-sponsors of the APMP Capture & Business Development Conference in December, helping to coordinate speakers to address category management. “This is an issue we will continue to monitor and educate our members about and help however we can to address their needs,” said Pafe.

For information about upcoming APMP-NCA events and to learn more about category management, log in to [APMP.org](http://APMP.org).

Trying to push the various agencies and departments toward a central approach inevitably comes up against constraints, so you have the proverbial pendulum swing and a movement back to more of a decentralized focus.”

In early October, the Office of Management and Budget invited public comment on its proposed circular regarding implementing category management for common goods and services. APMP leaders are monitoring the situation closely for the opportunity to comment in a way that reflects the membership’s perspective.

Whatever the future may hold, federal contractors should pay close attention to the developments around

category management in the federal procurement process and plan for a variety of scenarios. For incumbent contractors, revenue streams could disappear, and for those looking to break into the federal purchasing market, an increasingly complex procurement process could require investment in a more sophisticated proposal machine. At the same time, change often means new opportunities for both established players and newcomers alike. ●

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**Justin Gensing** is a freelance writer and attorney based in Minneapolis, Minnesota. This is his first contribution to *APMP Journal*.

# BUILDING A **CAREER** THAT'S **NO ACCIDENT**





# APMP WORKS TO SUPPORT THOSE WHO ENTER THE PROPOSAL WORLD UNEXPECTEDLY WHILE ALSO CREATING OPPORTUNITIES TO STEER PROFESSIONALS INTO THE FIELD

By Ian P. Murphy

**A**PMP members often joke that their careers as proposal professionals began when they were just walking down the hall and someone pulled them into an office and asked them for help. “They said, ‘Charlie’s a pretty good writer—let’s get him to help us,’” says Charlie Divine, CPP APMP Fellow, APMP’s director of certification. “Or, ‘Hey, there’s Betty! I saw her draw some stuff. Let’s get Betty to help with this.’ It was kind of a haphazard thing.”

A career in proposal management is often a matter of happy accident, started when an individual happens to be in the right place at the right time—that time when a boss, colleague, or co-worker needs help with an RFP or some kind of sales support. Many who excel at that initial task are assigned more work like it, and they may eventually steer millions of dollars in contracts for firms and clients, even without formal education or training.

## HAPPENING INTO A CAREER

Until that initial strike of lightning, many successful proposal management professionals never set out to be proposal managers. “No one I know purposely decided to become a proposal professional,” says Jeannette K. Waldie, CPP APMP, principal consultant of Houston-based JK Waldie & Associates.

Waldie first found herself writing proposals after she dropped out of college and took a temporary job with a defense contractor. “I was hooked on it immediately because I like to write,” she says. After relocating to Houston, Waldie landed a job as a secretary with an environmental firm, again putting her organizational skills and writing talent to work on proposals. She leveraged that experience to get a job in the proposals department at KBR, a technical writing firm. “That’s when things took off,” she says.

Waldie joined APMP in 2003 and has volunteered with the Houston Chapter ever since. That involvement was “a huge assist in my career,” she says. Today, she

holds a degree in marketing and has her own firm, which handles a variety of clients—from small, minority-owned businesses to multinational corporations.

Certification brought validation for her services, and APMP’s courses and webinars augmented that certification with ongoing education, helping her sell clients on suggestions. “With [the courses], I’m able to say, ‘See, I’m not the only one who says this,’” says Waldie.

Waldie attended her first APMP conference four years ago at Walt Disney World. She sent her youngest son, who was in high school at the time, to the theme park while she soaked up all of the professional development. “The conference is my Disney World,” Waldie says. “Not only do I get to learn from the best of the best, but I also get to share my knowledge. It helps me know I’m not alone in this crazy profession.”

“THE CONFERENCE IS MY DISNEY WORLD. NOT ONLY DO I GET TO LEARN FROM THE BEST OF THE BEST, BUT I ALSO GET TO SHARE MY KNOWLEDGE. IT HELPS ME KNOW I’M NOT ALONE IN THIS CRAZY PROFESSION.”

—Jeannette K. Waldie, Principal Consultant,  
JK Waldie & Associates

## FOLLOWING THE MUSE

Robin Davis, CF APMP Fellow, founder and principal consultant of Metre, had an associate’s degree in secretarial science when she moved to Nashville to pursue a career as a singer-songwriter. “I did the circuit for a couple of years and realized that I wasn’t going to be one of those special people who makes a living that way,” she says.

Fortunately, she had a day job as an administrative assistant with Healthways, a company that designs

wellness programs for insurance companies. Healthways started getting RFPs. “[Someone from] the sales team would say, ‘Hey Robin, is this something you can pull together for me?’ After doing a couple of them, I thought, ‘This is someone knocking on our door, wanting to buy something—and we’re not treating it as strategically as we should.’”

Davis’s role grew as her proposals got results, but she felt there was more to the process than what she could learn by doing. “I found APMP and told my boss that I needed to go to a conference to see what it was all about,” she says.

At the 2002 Bid & Proposal Con in Salt Lake City, Davis found that the job she had defined for herself had an established set of best practices and thousands of seasoned practitioners. “I thought, ‘This is the promised land! These are my people!’” she says. “I am not alone. I don’t have to figure this out all by myself. Everyone has this figured out already.”

“The things I learned about the process were huge,” she says. “[Knowing about] the database tools—and the fact that there were others out there to network with and learn from—was huge. It made all the difference in the world. I told my boss [that] there are hundreds of people who have been doing this a long time. They have strategies that are proven and effective, and all we had to do was follow them.”

**“APMP ALLOWED ME TO CREATE MY OWN CAREER PATH. EVERYTHING I LEARNED, I LEARNED FROM APMP OR THE PEOPLE I MET THERE.”**

—Robin Davis, Founder and Principal Consultant, Metre

Davis was senior director of the company’s 10-person knowledge management and proposals team by the time she struck out on her own in 2009 with Metre, a firm that manages proposal development, sales operations, and market research for health care companies. “In music, anything without meter is a bunch of noise,” she explains. “As proposal writers, we bring everything together and set the pace to tell a story.”

APMP certification has helped prove the value of her services to clients. “Certification is important,” Davis says. Ongoing education has helped focus her career, she adds. “It’s something I like to do, and I’m pretty good at it. APMP allowed me to create my own career path. Everything I learned, I learned from APMP or the people I met there.”

## FROM NETWORKS TO NETWORK

Even APMP’s Divine started out in another field. Educated as a physicist, he got on-the-job training in proposal management with Southwestern Bell (SBC) at the turn of the century, when salespeople were having a hard time getting customers to subscribe to its data networks. “We tried to simplify things by going along with the salesperson,” he says. “What we were doing was writing proposals, and we didn’t know it.”

When large companies such as Boeing started signing on, Divine began recruiting people with backgrounds in journalism and graphic design, occasionally cherry-picking public relations staffers facing layoffs as SBC right-sized. “I filled my whole organization with journalists,” he says. “I recruited a group of communicators who could take complicated information, find out what customers needed, and listen to the salespeople.”

Most of the skills a proposal management professional needed early on were clerical, he notes. “There were people writing proposals 35 years ago with typewriters and correction tape,” says Divine.

“One day, we said, ‘Let’s get a conference room and make a profession out of this,’” Divine says. “Having come from a place where almost anybody could write a proposal to creating a set of defined entry-, mid- and advanced-level competencies has brought the profession to a different realm.”

Waldie and Davis agree that the biggest requirement is being able to write coherently. “Writing is obviously helpful,” Davis says. “Everything else can be learned. Once you’re in proposals, you can find your way to what you like to do best.”

## MAKING EDUCATION OFFICIAL

Davis says APMP should continue to focus on getting proposal management coursework into college and trade school curricula. She went to a “get-in/get-out-fast” school and believes that the discipline can be taught in the same way.

Ongoing education can help the accidental proposal professionals prove their value, Davis adds. “On the commercial side, everyone grows out of other areas, as I did. It’s seen as somewhat of a clerical position. It doesn’t get the respect it deserves; people don’t understand the value. My mantra is ‘What are you doing to change that?’”

“Professionals must stay relevant. Look at all of the programming and offerings in the local chapters and international conferences,” she says. Even if a webinar focuses on federal spending, “You are going to learn something. Every presenter has something to offer. Listen and take from it what you can.”



“WE REALLY WANT TO MOVE OUT OF THIS MODE OF ACCIDENTALLY GETTING INTO THE PROFESSION TO HAVING A DEFINED PROFESSION. WE WANT PEOPLE TO UNDERSTAND THAT IT’S A REAL PROFESSION, AND THEY CAN MAKE A CONSCIOUS CHOICE TO PREPARE THEMSELVES FOR IT.”

—Charlie Divine, Director of Certification, APMP

Prior to APMP, people learned only from each other’s “war stories,” Divine says, when they imparted their experiences in making things up as they went along. Now, the APMP Body of Knowledge is the ultimate resource that shows people how to proceed. “We really want to move out of this mode of accidentally getting into the profession to having a defined profession,” he says. “We want people to understand that it’s a real profession, and they can make a conscious choice to prepare themselves for it.

“We’ve taken it from that job anybody can do and defined this set of core competencies for proposal managers at all levels, and we built the first certification around those competencies,” Divine says. “There is a set of standards for the behaviors, knowledge, and skills that

you need in order to do this job well. APMP has designed a certification program that takes a bunch of disparate professions and creates a profession out of it.”

Continuing education helps members identify and cover gaps in their knowledge, he adds. And certification is helping push salaries higher—lifting all boats, no matter where they sailed from. “Every once in a while, I’ll hear, ‘I’ve been doing this for 40-plus years; I don’t need to get certified,’” Divine says. “And I say to them, ‘You’re right! But every time another person gets certified and stands up for our professional standards, it helps us all—and we would love to have your help.’” ●

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**Ian P. Murphy** is a freelance writer and editor based in Chicago, Illinois.



# IMPRESSIONS

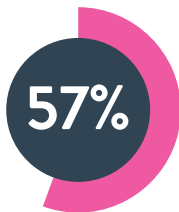
## Members Make the Association

**APMP MEMBERSHIP GROWTH** has continued to break records over the past five years, with a 70 percent increase since 2011. APMP's 2015 annual report includes other captivating figures as well. Here we've collected some impressive statistics about your accomplishments that contribute to association development and increased opportunities.

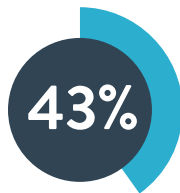


### GOING GLOBAL

APMP has expanded its international presence in recent years, and that trend is continuing. APMP members represent 96 countries, including new representation in Asia with the launch of APMP Japan in 2015, which debuted with 30 members.



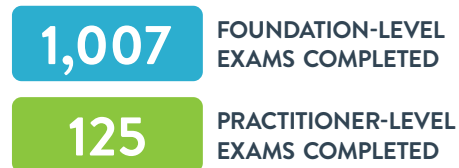
U.S. MEMBERSHIP



INTERNATIONAL MEMBERSHIP

### CERTIFIABLE

Foundation-level exams were off the charts in 2015, leading to a 26 percent increase since 2011.



### CONFERENCE CONNECTIONS

In 2016, you helped break attendance records again at the APMP Bid & Proposal Con in Boston.



APMP looks forward to continuing to celebrate membership growth and engagement in 2017 and beyond. The full 2015 annual report, as well as reports from previous years, can be accessed at [APMP.org/APMPannualreports](http://APMP.org/APMPannualreports).

\*The 2016 Bid & Proposal Con roundup is available at [APMP.org/conference2016](http://APMP.org/conference2016).



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