journal

VOLUME II NUMBER II // 2014

APMP

Your Professional Guide to Winning Business

+

THE APMP Procurement Improvement Committee

Kicks Off

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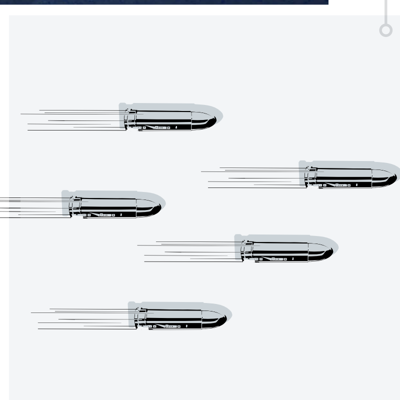
APMP JOURNAL VOLUME II NUMBER II // 2014



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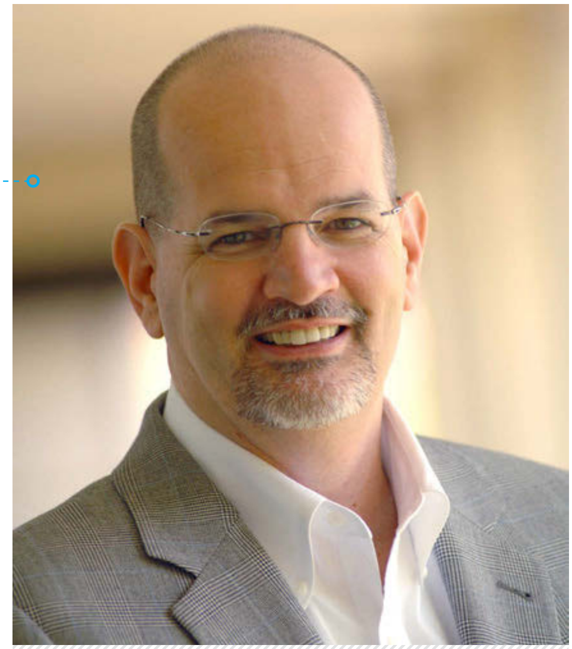

APMP GOES TO CAPITOL HILL

For the first time in APMP's 25-year history, we are embracing the collective voice of all of our members and taking it to Capitol Hill. Through APMP's Procurement Improvement Committee (PIC), we are reaching out to government procurement and acquisition leaders, agency heads, Congressional committees, and elected officials to educate them about the need for procurement reform.

So, why now, after 25 years? For starters, our membership has grown to the point that we are a force, an entity with an opinion that should be shared. We are also organized around a collective belief that we can help make a difference in the dialogue about procurement improvement.

Our message is simple. We believe that more communication between government and industry throughout the proposal life cycle will dramatically improve the procurement process and save the government billions of dollars annually. That's why APMP staff and an army of our member volunteers are scouring the *Congressional Record* and a variety of other resources to learn who would benefit from a meeting.

To date, we've met with the procurement and acquisition professionals at the Department of Veterans Affairs, the Department of Homeland Security, and the comptroller of the state of Maryland. What we learned would shock even the most seasoned government contracting professional: More often than not, our government procurement and acquisition counterparts agree with us. Our goal is to meet with the lead procurement person at every federal agency to learn how we can streamline the procurement process.

On page 30, our PIC chairman, Robert Lohfeld of Lohfeld Consulting Group, tells the full story of APMP's PIC and our Capitol Hill efforts. It is fascinating to see how far the PIC has come in just one year.

Our government counterparts are listening, and we are too. We've learned about government's challenges and have outlined those in APMP's *Closing the Procurement Gap Survey Report,* available to all members.

APMP's PIC is about members joining together and moving our agenda forward through education on the Hill, and it truly is working.

RICK HARRIS, CF APMP
Executive Director
+ *rick.harris@apmp.org*

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18400 Von Karman Avenue, Suite 500
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FROM APMP'S
CEO

With just a few months left in my tenure as the CEO of APMP, I have seen extraordinary progress on the three-pronged elements of my vision: "elevating the professionalism of our association" as laid out in the *Journal* this spring, specifically in the areas of career, community, and certification.

This year we unmistakably elevated our association as professional, continuing to engage, educate, and inform senior-level stakeholders within corporations and governments around the world, while providing opportunities for current members to thrive.

Career—We established a board-driven Professional Development Committee that is working to create career ladder guidelines reflective of international business norms. The goal is to provide members and companies a framework to understand and develop plans for talent acquisition, management, and expansion. You will start to see the fruit of this committee's labors soon.

Community—Our communities—built on content, not only geography—continue to grow and expand. We are engaging more corporate members to support industry endeavors. The APMP Procurement Improvement Committee's success in engaging U.S. federal customers to work with industry shows meaningful promise in our quest to improve acquisition processes. The APMP commercial community continues to provide content, best practices, and networking opportunities for commercial proposal professionals.

Certification—Before the end of this year, we will have a fully functional *Body of Knowledge* that is the brainchild of the best and brightest members of our association. This material will serve as the basis for the APMP foundation-level study guide for industry certification, delivering in-depth research in international proposal community best practices.

I am extremely proud of the remarkable growth we made this year, continuing to enhance and highlight the professionalism already present in our association and in our APMP members. I look forward to the next generation of APMP leaders and our industry's continued success in 2015 and beyond.

COLLEEN JOLLY, CPP APMP FELLOW
Chief Executive Officer
+ *colleen.jolly@APMP.org*

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Rick Harris, CF APMP

EDITORIAL
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PRODUCTION
The YGS Group
3650 West Market Street
York, PA 17404
Phone 717-505-9701
Fax 717-505-9713
+ www.theygsgroup.com
+ apmpjournal@theygsgroup.com
Account Director
Tina Enck

ADVERTISING
Patrice D. Scheyer
+ patrice.scheyer@apmp.org
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stages

C CAPTURE
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GP GRAPHICS + PRODUCTION
PM PROPOSAL MANAGEMENT

C

KEEP IT TURNED ON

Don't Stop When the RFP Drops

COMPETITIVE INTELLIGENCE LESSONS LEARNED FROM THE RING

By Christina Battagliese

SOME OF THE MOST SUCCESSFUL companies, like the best boxers in the world, may not be the biggest or the fastest fighters in the ring, but they are the smartest and most strategic when it comes to studying their rivals and landing their punches. While good capture teams generate competitive intelligence (CI) before the proposal process, the best teams continue to gather and leverage CI after the RFP drops, to adapt their win strategy in the hopes of a knockout.

"ONCE THAT BELL RINGS YOU'RE ON YOUR OWN. IT'S JUST YOU AND THE OTHER GUY." – JOE LOUIS

Social media has changed the way companies leverage CI during the capture fight. Every day, thousands of comments, reviews, tweets, résumés, and documents are posted that yield insight into the competition. In a study of 150 companies, Forrester Research reported that 82 percent monitor social media specifically for competitive intelligence purposes. The best companies recognize that the clock doesn't stop after the RFP drops. They use this time to monitor blogs, Web pages, press releases, and other social media avenues for key messages, corporate updates, and product launches and use this information to fix any issues quickly and adapt their strategy and proposal messages accordingly.

"INACTIVITY IS THE BIGGEST SIN IN BOXING." – SUGAR RAY LEONARD

Lack of resources, perception issues, and source fatigue are some of the reasons companies cease their CI efforts post RFP. In companies without dedicated CI teams, capture managers do double duty as proposal or CI leads. Once the RFP drops, the pressure is on to write a winning proposal, not collect intelligence. But as any good boxer knows, the best offense is a good defense. Keeping tabs on a competitor's swings throughout the proposal cycle can throw more weight behind a company's strategic counterpunch. Second, there is the perception that little additional intelligence can be gained during the blackout period. However, weeks or months may have passed since the black hat or blue team reviews and the RFP release. CI needs to be refreshed as critical information—such as key personnel departures, relevant contract award terminations, financial issues, and operational performance problems—may have surfaced in the interim. Thus, there is value in revisiting and verifying the intelligence collected during this time. Finally, "go to" intelligence sources become tapped and seem to have no additional insight to offer. However, while a competitor may have "gone dark," its teammates might not and could be leaving a valuable CI trail.

"A LOT OF GUYS GET DISTRACTED, WHICH ONLY HURTS THEM. YOU MUST STAY FOCUSED AND WORK VERY HARD AT BOXING." – GERRY COONEY

When CI is executed successfully, head-to-head comparison claims in a proposal become memorable to the reader. Ghosting the competition is an effective way to block and parry your rival's strengths and claims and reinforce your superior value proposition. When leveraging CI to ghost the competition, remember the following: 1) Less is more. Use time wisely and focus the CI team or individuals on finding information in one or two key areas or issues.
2) Focus intelligence efforts on comparing apples to apples. Think Sony's Playstation vs. Nintendo's Wii: "Yoga Isn't Gaming." 3) Trust but verify. Ensure that all intelligence points are verified and substantiated, prior to submission. In 2013, Samsung was fined $340,000 for paying students to bash rival products in fake Internet posts. 4) Do not mislead the reader. Coke was sued by Gatorade for overstating the product benefits of its Powerade drink. 5) Be ethical in the final push for competitive intelligence.

Leveraging CI post RFP is both an offensive and a defensive strategy. It is a last-chance opportunity to throw a counterpunch that is designed to protect you while knocking your competitor off balance. The RFP helps capture teams formulate more pointed questions and can focus CI teams on finding specific information. Knowing exactly what information is needed and how to use it is key in generating a winning proposal. In the words of Muhammad Ali, *"Don't count the days, make the days count."* ●

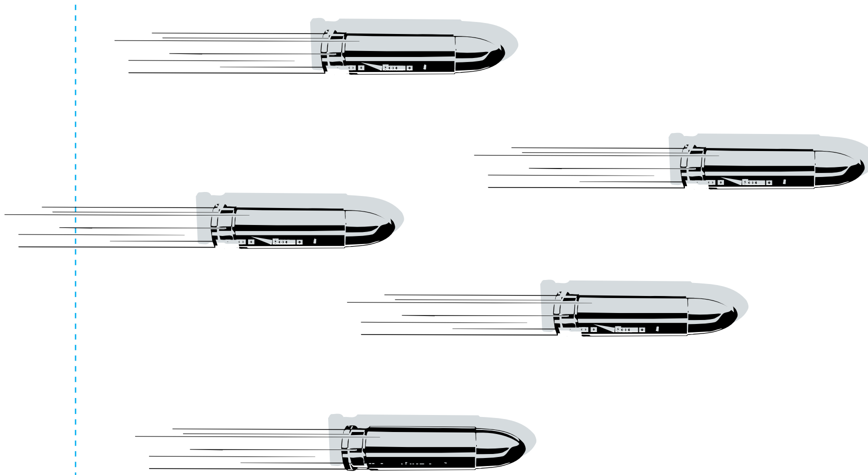
Christina Battagliese is director of strategic projects, CMI at BAE Systems. Battagliese can be reached at + *christina.battagliese@baesystems.com* or 703-907-8471.

SURE SHOT

5 Silver Bullet Factors That Win Proposals

HISTORICALLY, GET THESE RIGHT AND THE CUSTOMER WILL PULL THE TRIGGER

By Mike Parkinson, CPP APMP Fellow



IS THERE ONE silver bullet that wins proposals? Yes and no. Trust is the closest factor I have found to being the silver bullet that wins proposals. Your customer must trust that you can deliver the solution at the agreed-to price with little to no issues. (Do you make it a habit of buying from people or companies you do not trust?) No trust, no win.

There is no one silver bullet factor that definitively guarantees a win. There is no one thing that *always* works; nor is there one thing that can offset a sea of negative influencers (e.g., bad reputation, noncompliant or poorly executed proposal, lack of customer insight). However, there are five silver bullet factors that greatly impact the likelihood of a win, and

these factors require customer trust for them to prevail.

These five silver bullet factors historically tip the scales in favor of one solution provider over another. Which factor(s) to use varies according to circumstances. The five silver bullet factors can be cumulative and are relative: relative to one another and relative to other factors. In other words, relative to all other aspects of proposal development, one could call these silver bullets because of the historic weighting of these five variables.

FACTOR #1: PRICE

The right price can win a proposal, especially when the customer is focused on price (for whatever reason). For example, if the customer is downsizing and needs to buy your solution, there may be great pressure to spend less money. A low, *realistic* price is paramount. Signs that price is a silver bullet factor should be evident based on customer insight and RFP language and type (e.g., LPTA, a heavy weighting toward price, in government RFPs; a high quantity of price-centric terms in commercial RFPs). Commoditized solutions are often purchased based on price.

Selecting the winning price requires insight and discipline, and it must be proven possible. If the customer does not *trust* that you can deliver the solution to the customer's satisfaction at the listed price, you will not be chosen as the solution provider.

FACTOR #2: SALES OR CAPTURE

Most proposals are won before the RFP is released. Cultivating a strong relationship with your future customer is key. The more you know your customer (and the more your customer knows you), the better your chances of success. It is common that white paper content supplied by a solution provider can be found in an RFP, which favors the solution provider that supplied the white paper. The proposal is that provider's to lose.

Learn all you can about your future customers. What are their hopes, fears, and biases? If possible, meet with them. Establish a relationship. Build *trust*. Help your future customers connect your solution with their problem. Make it easy for them to favor your solution by providing (easy to copy and paste) soft-copy content that differentiates your solution from your competition (e.g., white papers, specifications).

FACTOR #3: REPUTATION

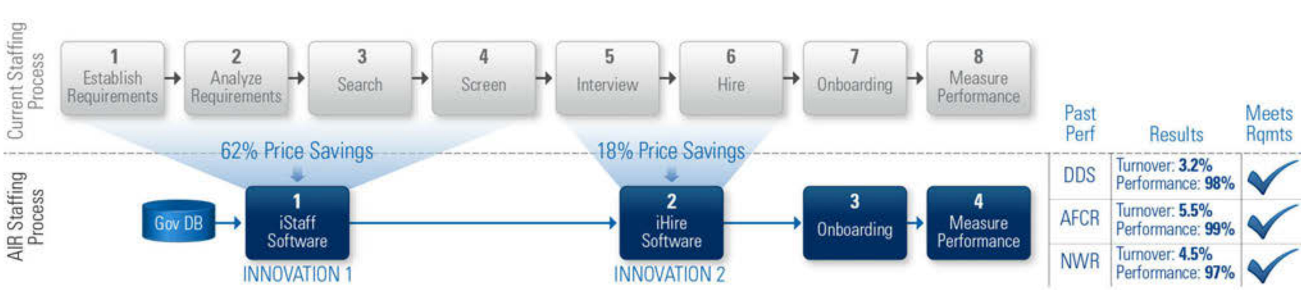
Buyers and decision makers are risk adverse. They fear making the wrong choice. There is a saying, "No one was fired for hiring (insert well-known company here)." If there are three companies vying for one contract and two are unknown, the known company usually wins. It is safer. It is a *trusted* solution provider.

Solution provider reputation is often established over time and independently of a single proposal contract. Popularity, branding, marketing, and word-of-mouth are keys to building a strong reputation.

Unknown companies can leverage this approach. Use testimonials and past performance to allay fears (see "Factor #5: Proof"). Everyone claims to be capable—perhaps even superior—but very few prove it. Who says you are the best besides you?

FACTOR #4: PROFESSIONALISM

Perceived professionalism, based upon the quality of the proposal, intrinsically transfers to the solution and the solution provider. All content the decision makers receive must support your professionalism to build *trust*.



In a recent large government RFP (FAA AIMM DTFAWA-13-R-00020, Section L.6.0.), the first bolded paragraph under the "Instructions to Offerors" reads:

"OFFERORS ARE CAUTIONED THAT THE GOVERNMENT CONSIDERS THE OVERALL FORM AND SUBSTANCE OF THEIR PROPOSAL TO REPRESENT THE GENERAL QUALITY OF WORK EXPECTED TO BE PERFORMED UNDER THIS CONTRACT. ACCORDINGLY, IT WILL BE CONSIDERED THROUGHOUT THE REVIEW AND SCORING/ EVALUATION PROCESS."

Although common knowledge among proposal professionals, this is one of the few times this factor has been formally stated in a government RFP.

An evaluator in an international commercial bid told me that the winning proposal was so well done (i.e., was aesthetically superior, easier to read and evaluate, made of quality materials, of a better print quality, and customer-focused) that the evaluators considered not reviewing the other proposals. He said that it was obvious who wanted it more, was more dedicated, and was going to deliver a better solution. On page 10 are two proposal pages from the same solution provider. Which do you think will be seen as more professional by an evaluator: A or B? Content isn't king; contrast is.

To make your proposal stand out, use experienced proposal professionals, writers, designers, editors, desktop publishers, and printers. The quality of your document, from cover to cover, informs your customer's perception of your professionalism and abilities. (Relativity is significant. If all proposals are professional, then none stand out, and other factors become more important.)

FACTOR #5: PROOF

Many proposals make unsubstantiated claims hidden behind jargon. Measured, quantified proof, such as past performance and metrics, validates claims and reassures buyers. Your customer needs to believe (*trust*) your claims. Use graphics, callout boxes, and highlighting to draw attention to proof points. The chart at the bottom of page 10 helps prove how the price can be 80 percent lower and provides past performance metrics.

These five silver bullet factors have one thing in common. They must resonate with the customer and build *trust*. For example, if the price is too low based upon customer expectations, then the customer may not trust that you understand the complexity of the problem. Customer insight and an understanding of the problem are paramount to building trust. For this reason, some factors may trump others (e.g., reputation may trump price in some situations).

Know your customer. Decide what silver bullet factors will work best and apply them. Measure your success and improve. ●

Mike Parkinson, CPP APMP Fellow, is a partner and head of marketing at 24 Hour Company *(www.24hrco.com)* specializing in bid-winning proposal graphics. His Billion Dollar Graphics website *(www.billiondollargraphics.com)* and Get My Graphic website *(www.getmygraphic.com)* share best practices and helpful tools with professionals. He can be reached at (703) 533-7209 or + *mike@24hrco.com.*

NECESSARY FICTION

A Novel Approach

START AT THE END, END AT THE START

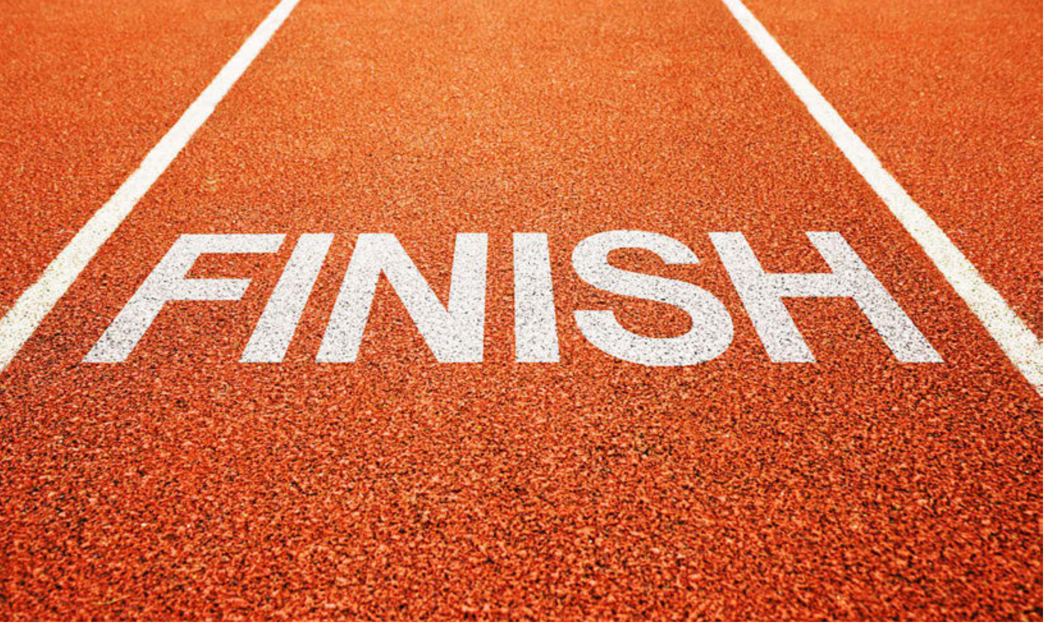
By Frank Cipparone

BD

PUBLISHED AUTHORS and proposal writers are more alike than you think. Both have nightmares about deadlines. Both fear a blank page and its blinking cursor. More importantly, their approaches to great writing share common traits. Create a work plan and stick to it. Don't be afraid to delete your best sentence. And, most relevant to proposals, start with the end in mind.

What works for Stephen Covey's highly effective people has aided authors in both business and literary realms, including the renowned Graham Greene: "So much of a novelist's writing … takes place in the unconscious; in those depths the last word is written before the first word appears on paper."[1] To be successful, you have to know where you want to go. If you want to frustrate yourself, respond to an RFP with no goal in mind. You'll end up with canned text interchangeable with that of any competitor or a meandering mess of half-baked ideas.

For the novelist, starting with the end in mind requires an



CREATE A WORK PLAN AND STICK TO IT. DON'T BE AFRAID TO DELETE YOUR BEST SENTENCE. AND, MOST RELEVANT TO PROPOSALS, START WITH THE END IN MIND.

understanding of the characters. You can see how they will act in any situation because you know their personalities: their ambitions, their motivations, their fears. A book's ending is simply the logical extension of all character timelines to the point where they fulfill the promise of the story.

In a proposal, your main character is not your company. It's the client: the economic buyers, the users, the influencers. By understanding these protagonists—and occasional antagonists—you can envision where they need to go, while showing how your service will get them there. Marrying client objective to company objective outlines a true partnership between organizations, fulfilling the promise of your story. It also focuses your response. In other words: you know the end at the start.

After you've outlined your proposal, addressed all criteria, and made a compelling case, it's time to go back to the beginning—specifically, some of the greatest beginnings ever written, with apologies to Charles Dickens and countless dark and stormy nights.

- Call me Ishmael.[2]
- A screaming comes across the sky.[3]
- The man in black fled across the desert, and the gunslinger followed.[4]

A great opening sentence is an invitation. These three examples entice the reader to keep going. "An opening line," said Stephen King, "should say: Listen. Come in here. You want to know about this."[5] That's the goal of all writing, whether it's an epic retelling of a whaler's thirst for revenge or a response to a proposal for comprehensive janitorial services.

Think about the first words your readers will see. A series of banal pleasantries or a rehash of your corporate history won't entice a prospective client to turn the page. Start out aspirational. Provide a glimpse of the ending. If you are looking for a place to confound client expectations, the beginning is where you should do it. These examples are absent their context but still demonstrate how an opening should feel and sound:

- Advance the line.
- Pursue well-being.
- Think again about the future of service.

These are not typical first sentences: they are imperatives. They disorient readers while enticing them to find out why they feel disoriented. Such sentences are highly effective, but they work only when based on the same client understanding you use to form your ending.

A novel's characters don't start and finish in the same place, and neither should your proposal. But the two points should be intertwined. By connecting an evocative beginning to a fulfilling ending, you unite your document thematically. And the place to begin that task is at the end. ●

Frank Cipparone is the content manager for Aramark's Business Resource Center and has more than 10 years of experience in copywriting and editing. Cipparone can be reached at 215-409-7816 or + *cipparone-frank@aramark.com.*

Endnotes

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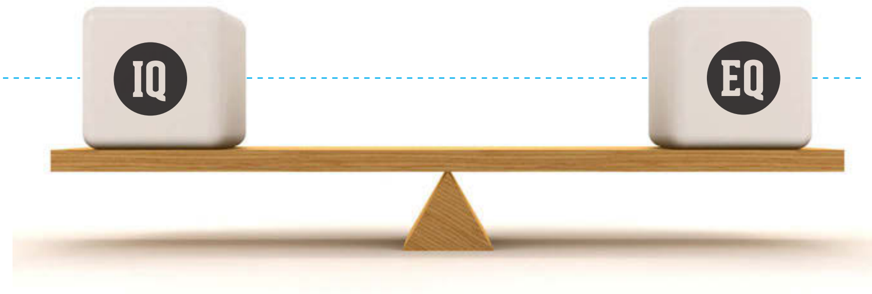
VALUE PROPOSITION

Positioning to Win

BUILDING A BUSINESS CASE WITH THE CLIENT

By Stan Balfour



TODAY'S ENVIRONMENT is complicated and fiercely competitive. Many companies have seen their revenues go flat or decline. In order to survive and thrive, companies need to improve their business development and capture skills. They must be as good at winning business as they are at their core business. Companies that have high win rates are usually good in their technical area of expertise and also have the skills to build a good business case that improves their clients' business/mission.

To build value for the customer, top performers in business development and capture must have skill sets in two areas: IQ (intelligence quotient) and EQ (emotional quotient). Lack of either is a fatal flaw in today's environment.

IQ: INTELLIGENCE QUOTIENT

IQ is about technological knowledge and skill.

You must:

- Know your industry and your products and services
- Use this knowledge effectively with customers
- Have critical- and creative-thinking skills
- Take an unbiased view of what's going on
- Have the ability to solve your clients' problems
- Organize a result that improves their business/mission
- Be prepared when you meet with clients
- Not go by the seat of your pants

Those who are weak in IQ cannot convert their observations into results. They think they understand what the clients need better than they do. They try to fit clients' needs into their solution. They have creative ideas but little useful application. They cannot build a business case that influences their clients. When the RFP comes out, they are not in a favored position.

EQ: EMOTIONAL QUOTIENT

In his book *The Speed of Trust,* Stephen M.R. Covey says "The degree of trust has hard economic consequences: as trust goes up, speed goes up, and costs go down. As trust decreases, everything slows down, and costs rise."

Emotional quotient is a measure of how well and how fast you can communicate and build relationships with others. It is the ability to connect with your clients and build trust. Top performers have good diagnostic skills. They do not prescribe a solution for clients without understanding the clients' problems and the impact on their organization or the future results they want to create. The way they sell is a preview of how they solve clients' challenges.

Top performers have an organized way to ask questions. They are patient listeners. Clients' problems are clearly solved and the desired results achieved. When an RFP comes out, they are already in a favored position. They have built a strong business case and have good win rates.

Those that are weak in EQ usually lead with their solution. They start talking about a solution before they have diagnosed. Many times they guess or assume what a client's issues are. The problems solved aren't the highest priority to the client. Expectations are not met. The business case is weak and has little influence on the client. Because of these weaknesses, they have low win rates on competitive bids.

THE GOOD NEWS

The good news is that these are learnable skills. Some people intuitively have these skills, but most individuals need training. As in engineering and other technical areas, skills must be repeatable and documented. People that are trained will be able to build a good business case, put themselves in a favored position with their clients, and have higher win rates. ●

Stan Balfour is a senior consultant at Shipley Associates. He can be reached at 801-403-5756 or + *srbalfour@shipleywins.com.*

Much More Than a Proofreader

WHAT IT MEANS TO BE A RED TEAM REVIEWER

By Krystn Gull, CP APMP, LEED AP

HOW MANY RED TEAMS have you participated in that focused on editorial comments? Instead of belaboring the discussion about where to put a comma, red teams should focus on the things that most affect your chances of winning the contract.

RESPONSIBILITIES

As a red team reviewer, *you are more than just a proofreader*. In fact, you should spend little to no time paying attention to grammatical and spelling errors; trained editors will review the proposal post-red team. Your primary responsibility is to make sure the answers to "why us?" and "so what?" are clear, concise, and woven beautifully throughout the proposal. As a red team reviewer, put yourself in the selection committee's shoes and evaluate the proposal. Assist the proposal team in enhancing your win themes. Suggest ways to present these and other proposal elements visually through graphics. Challenge the team to say as much as possible in the fewest number of words. Don't just identify problems: Offer specific solutions.

GOALS

Your goal is to have a winning proposal. The critical elements for the red team review are compliance, optimization against evaluation criteria, strategic and competitive focus, and presentation.

COMPLIANCE WITH RFP REQUIREMENTS

Your proposal must achieve compliance with all stated requirements to even be considered. You may want to assign one red team reviewer to focus solely on compliance and give that person a detailed compliance matrix to check the proposal against.

OPTIMIZATION AGAINST EVALUATION CRITERIA

How does your proposal stack up against the evaluation criteria listed in the RFP? Are you unbalanced or lacking in certain criteria? The red team review identifies any weak links in your proposal and boosts the evaluation score. Does your proposed solution to the client's issues offer the best value? Have all your benefits been tied to the evaluation criteria? Is your proposal price competitive?

STRATEGIC AND COMPETITIVE FOCUS

You must ensure your proposals are "benefits rich" and answer the questions "why us?" and "so what?" clearly and persuasively. You must highlight what differentiates you from the competition. What do you offer that no one else can offer? Simply stating that you have the right project manager or relevant past performance history isn't enough. You must demonstrate why the client should hire you, with discriminators that highlight your unique value.

PRESENTATION

Once you have achieved your win strategies through writing, you must enhance these ideas in a visually dynamic way. A thought presented through a graphic is more likely to be read and remembered than one presented through text. As a red team reviewer, consider these

THE CRITICAL ELEMENTS FOR RED TEAM REVIEW ARE COMPLIANCE, OPTIMIZATION AGAINST EVALUATION CRITERIA, STRATEGIC AND COMPETITIVE FOCUS, AND PRESENTATION.

presentation aspects: Is your proposal design professional, powerful, and consistent? Are your win themes easy to identify in the proposal graphics? Do the graphic elements throughout the proposal provide the most effective presentation of your win themes?

EDITING AND STYLE

Your proposal team should help ensure an error-free and consistently written proposal. In all actuality, you may be more likely to survive a typo than a proposal that does not communicate your win themes, but you still want to ensure every proposal receives a thorough edit. If you have editing or style suggestions during your red team review, make them, but remember your focus is on other elements.

COMMITMENT

Consider sharing this article with your red team reviewers so they understand their roles. Reviewers should be prepared to dedicate time to reading the RFP documents and the proposal or their assigned sections of the proposal, participating in the red team review meeting, and clarifying any questions the proposal manager may have about their comments. Time commitments will vary based on the size of the proposal. Most importantly, red team reviewers must be committed to WINNING. ●

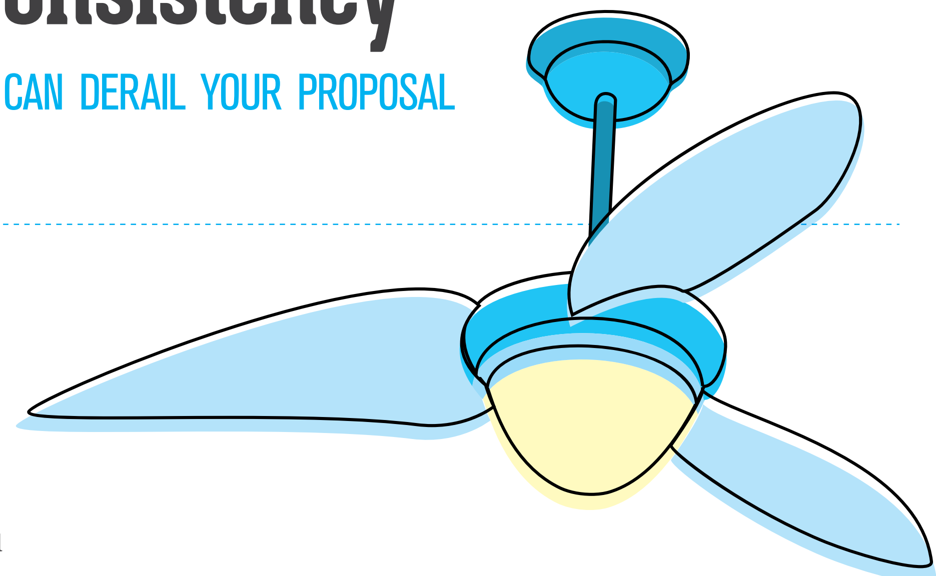
Krystn Gull, CP APMP, LEED AP, is the pursuit strategy manager for Burns & McDonnell, headquartered in Kansas City, Missouri. She is also the president of the APMP Greater Midwest Chapter. Gull can be reached at + *kgull@burnsmcd.com.*

CONSISTENCY COUNTS

Ceiling Fans and Proposal Consistency

HITTING A JARRING ITEM CAN DERAIL YOUR PROPOSAL

By Tim Pepper, CF APMP



TWO ROOMS in my house have ceiling fans with light fixtures. There are three switches on each panel: to control the fan, lights, and one outlet. For some unknown reason, the electrician wired the panels in each room differently, which causes a small annoyance when someone attempts to turn on or off the desired item. In one room, the switches go Fan-Lights-Outlet (FLO). In the other room, they go Outlet-Fan-Lights (OFL). The OFL (pronounced "awful") setup reinforces the inconsistent approach used during the construction of 72 identical neighborhood homes. This quirk, which I noticed during the walk-through before buying the house, made me want to pick harder on other items, with an expectation that I would find more problems. I wondered: "Is the plumbing shoddy? Are the window frames sealed? Did the previous homeowner cover water damage with fresh paint?"

Proposal evaluators react similarly. Once they hit a jarring item, it can derail their focus from listening to the solution and instead start them hunting for what else might be wrong. Proposal inconsistencies can irritate them enough to shut down and discourage their efforts to interpret the full offer. A style change can force readers to reorient their thinking, decreasing their comprehension and making their job harder. If you make it too hard, they might simply quit reading and move to the next proposal in the pile.

It is the job of proposal managers to prevent proposals from being tossed aside. How? They can start by shaping the proposal framework, providing clear author guidance, and reserving editing time for after the internal reviews.

Create the primary structure along proposal instructions and evaluation criteria. This attention to the framework helps reviewers follow along with their scoring checklists. Outline headings reflecting solicitation terms act as signposts that parallel proposal instructions and evaluation criteria. Weaving the statement of work (SOW) items into this primary structure sets logical expectations that relevant content will be addressed in appropriate sections.

Provide writing guidance for authors. Proposal contributors need clear instructions to provide consistent results. Tell them if you want topic sentences first or last; indicate the appropriate verb tense; and suggest where to use bullets, tables, and meaningful graphics. Annotate the proposal outline with clear references to the relevant instructions, evaluation criteria, and SOW elements. Set text length limits and encourage active writing. Provide reference materials and writing aids for words and phrases to avoid, consistent terms for the team and customer callouts, action verbs, adjectives, adverbs, acronym protocols, and other "wall of truth" items.

Reserve time for thorough editing and revision. Changing paragraph flow (e.g., from topic sentence with supporting statements to supporting statements and closing points) makes it harder to scan a proposal for relevant content. Shifting tenses can further confuse the reader. Multiple voices disrupt comprehension and harm evaluation scoring. It takes time to bring the committee voices together into a consistent presentation with parallel structure, tense, and flow. You need time to unwrap paragraphs into clear, concise, and compelling prose. If you have a contributor dedicated to a third-person passive voice, your editor has much work ahead to bring the point up front, trim the fat, and convert the passive prose into active statements.

Evaluation criteria are often subjective and expressed as a confidence factor in your ability to perform the work. Small inconsistencies may not sway the decision by themselves, but a cumulative negative impression detracts from the intended message.

Light switches and ceiling fans were not a deciding factor when I chose my house. I merely checked that the lights, fans, and outlets worked without catastrophic results. What the switch inconsistency did do was raise other concerns about overall workmanship: it made me look more closely during the home inspection. A proposal with a broad spectrum of little problems could be perceived as an indicator of your company's future performance (sloppy vs. precise) and could cost you the business. Does your proposal FLO, or is it OFL? ●

A PROPOSAL WITH A BROAD SPECTRUM OF LITTLE PROBLEMS COULD BE PERCEIVED AS AN INDICATOR OF YOUR COMPANY'S FUTURE PERFORMANCE ... AND COULD COST YOU THE BUSINESS.

Tim Pepper applies more than 19 years of experience in capture, proposal, and program management in Department of Defense markets. He is a senior proposal manager for General Dynamics Information Technology in Chesapeake, Virginia. Pepper can be reached at + *tim.pepper@gdit.com.*

PM

IMPROVEMENTS

New Proposal Best Practices

HOW TO IDENTIFY AND CREATE THEM FOR YOUR COMPANY

By Mitch Reed, CPP APMP

BEST PRACTICE is a commonly used—and often misunderstood—term that business professionals routinely apply to their work. But where do best practices come from, and why should proposal professionals care about them?

At its very core, best practice originates through the application of a tool, process, method, or technique, often through trial and error and lessons learned by individuals tasked with:

- Solving a problem
- Improving productivity
- Mitigating or preventing potential risks
- Producing improved or high-quality results

The transition to best practice occurs when these approaches are rigorously documented, thoroughly tested, and produce desired results when applied across multiple settings.

AT ITS VERY CORE, BEST PRACTICE ORIGINATES THROUGH THE APPLICATION OF A TOOL, PROCESS, METHOD, OR TECHNIQUE, OFTEN THROUGH TRIAL AND ERROR AND LESSONS LEARNED …

BEST PRACTICES MISCONCEPTIONS

- **Universal Application:** *Best practice applies to every situation.* In truth, a best practice must be applied in light of its intended application and context to yield the desired benefits.
- **"Cure-All" Effect:** *Best practices fix systemic proposal process and quality issues.* In truth, best practices applied as part of an overall process and management structure result in improvements.
- **Easy Application:** *Proposal staff members are easily able to execute or incorporate a best practice into normal operations.* In truth, application of new best practices often requires planning, staff training, procedure or process changes, as well as corporate and cultural change.
- **Instant Results:** *Best practice use yields immediate improvements in productivity, quality, and win rates.* In truth, it may take three or more applications of the new approach to fully realize the desired outcome.

WHEN IS A BEST PRACTICE RIGHT FOR YOUR COMPANY?

To decide when incorporating a best practice may be right for your company, consider the following:

- **Operational Environment:** RFP turn rates (e.g., 15 vs. 30 days), effect on supporting departments/subject matter experts (e.g., Program Management, Contracts, Engineering, Accounting, Purchasing)
- **Skills Necessary to Apply or Use:** Skills and understanding of personnel required to apply best practices to assigned tasks
- **Costs vs. Benefits:** Impact on proposal development cost and schedule

Best practices must be viewed within the context of their intended use and often must be modified to meet the desired goals.

HOW DO YOU IDENTIFY A BEST PRACTICE?

Best practices are identified through lessons learned from any work effort, using the following approach:

1. Review lessons learned on project efforts by identifying the following:
   a. Successful outcomes
   b. Challenges encountered
   c. Root cause of challenges
   d. How challenges were resolved
   e. If a defined process or approach was followed
   f. If so, did it prevent problems or yield unexpected results?

2. Analyze feedback.
3. Identify actions, tools, or techniques that demonstrated process improvement.
4. Adjust process and/or corporate policy with approved recommendations.

Focus the lessons-learned process on what went well, and why. Equally important is understanding and documenting areas of difficulty and identifying the cause of those, so as to avoid repeating failures. Ways in which difficulties are addressed are potential best practices.

TWO BASIC TYPES OF BEST PRACTICE

- **Industry Best Practices:** Those which have gained broad industry acceptance based on desired results
- **Local or Situational Best Practices:** Those designed to meet:
  - » A specific company's internal problem or productivity requirements
  - » Unique situations, to provide consistent improvements or desired results

Best practices evolve from initial use within a given company or group. As a best practice is validated, documented, and presented to the local user community, new users apply the best practice, evaluate its effectiveness, and continue the process of sharing with the broader community until the practice is adopted industrywide.

HOW DO YOU CREATE A NEW BEST PRACTICE?

1. Document the problem to be solved or prevented.
2. Document techniques, methods, or approaches used to solve/prevent the problem, improve quality, or increase productivity.
3. Detail, step-by-step, how the best practice was applied and results obtained from its use.
4. Present the best practice to the user community to test and to provide feedback.

By identifying and documenting the methods or processes used to improve productivity or solve problems, validating through testing, and sharing results with colleagues, you may create a best practice that becomes widely accepted. ●

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

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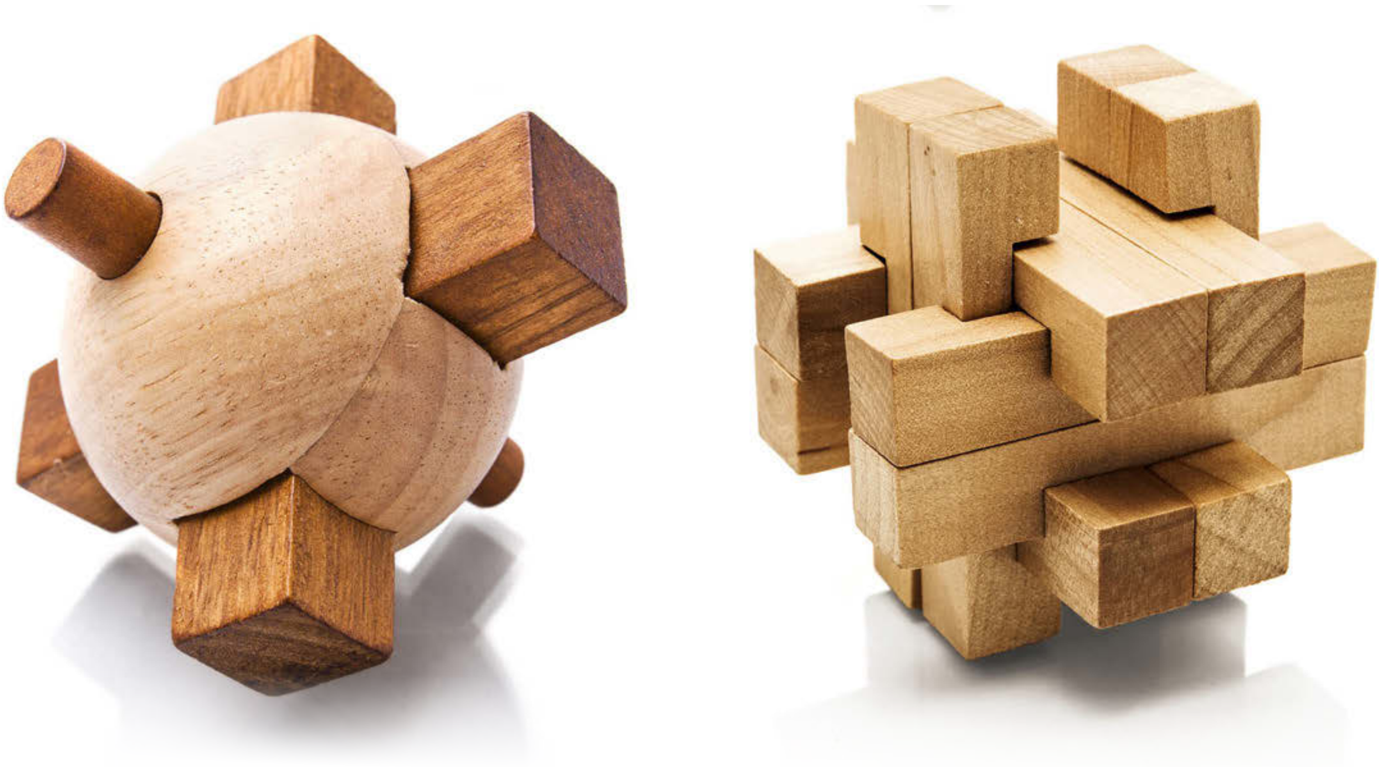

GOT GAME

Writing Proposals, Made Playfully Simple

MAKING THE TOUGH STUFF FUN

By Patrick Hofstadt, CF APMP and Lukas Pohl, CP APMP

CREATING PROPOSALS can be made playfully simple by using games as instructional tools in proposal management training sessions.

Through playful and engaging activities, participants gain a long-term learning effect. In addition to learning the company's standard bid process and basic writing skills, participants are better prepared to create winning proposals.

Have you ever played a proposal game? If not, try it. The results and lessons learned are worth the time investment. Here are some simple games that can help participants become familiar with various areas of proposal management:

- **Style bloom wall:** To set up this exercise, collect the typical pitfalls, mistakes, and

writing style weaknesses you see in proposals. Write the most interesting elements on cardboard "blooms." Each participant picks a bloom and reads it aloud. The participant then pins the bloom into one of the predefined categories (e.g., active/passive, superlatives) shown on the board and justifies that choice. This exercise illustrates basic writing guidelines and identifies common errors.

- **Terms and definitions:** This game helps participants learn proposal management terms. Write terms on a set of cards and write their definitions on a separate set of cards. Place all of the cards face down. Each team's first player turns two cards over and reads the words aloud. In the case of matching cards, the player takes them out and chooses the next pair. In the case of a mismatch, the turn moves to the second player on that team. Team members are not allowed to help each other. The first team uncovering all terms with their correct definitions wins.
- **Word comments:** When reaching a review milestone, proposal writers usually receive feedback through Word's comment feature. This game turns the tables and allows participants to consider the text from the reviewer's perspective. To prepare, use cardboard to make comment bubbles that look like those in Word and place an excerpt of a proposal document on a pin board. Participants look for where each comment may fit in the proposal text, pin the comment there, and explain their choice.
- **Priority pie:** Give participants a circular piece of cardboard and a short list of typical proposal chapter names, such as Management Summary, Introduction, Company Presentation, Subject of Offer, and Prices. Instruct participants to cut the "pie" into slices, one slice for each chapter, sized according to their view of the appropriate chapter weighting in the proposal document. This exercise illustrates how participants view and prioritize the proposal content and serves as a discussion vehicle for exploring multiple approaches. ●

THE "PRIORITY PIE" EXERCISE ILLUSTRATES HOW PARTICIPANTS VIEW AND PRIORITIZE THE PROPOSAL CONTENT AND SERVES AS A DISCUSSION VEHICLE FOR EXPLORING MULTIPLE APPROACHES.

Patrick Hofstadt, CF APMP, and **Lukas Pohl, CP APMP,** work as proposal managers and proposal trainers for adesso, one of Europe's fastest-growing information technology service providers, employing approximately 1,400 people in five European countries. Hofstadt and Pohl can be reached at + *patrick.hofstadt@adesso.de* and + *lukas.pohl@adesso.de,* respectively.

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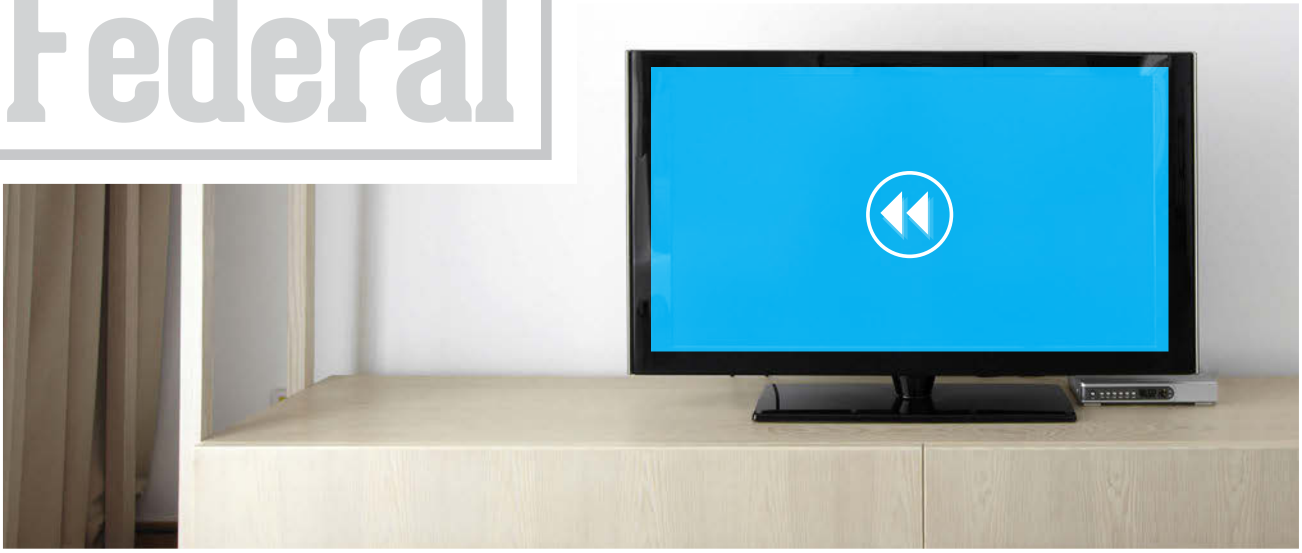

How Can You Protest-Proof Your Proposal?

By Jay Herther, CPP APMP Fellow

At the end of a game, the clock may be at zero, but the game is not over until the replay officials say so. A protest is like an instant replay that looks back to determine whether the referees followed their own rules. Most sustained protests were based on a flagrant foul that violated the stated source selection plan or process.

Protests slow down awards and keep agencies from getting what they need. A bid protest gives a bidder the right to contest the procedure or outcome of a contract award. A losing contractor files a protest if it suspects or knows it has been treated unfairly. Government Accountability Office (GAO) reports indicate that the number of federal protests has significantly increased. For example, the number of protests against the Department of Defense (DOD) doubled (100 percent increase), from 603 in FY2001 to 1,207 in FY2012.[1]

The GAO, the Federal Acquisition Regulation (FAR), and legal articles are rich with sustainment rate statistics and information on how and when to protest. Capture/proposal professionals and their government counterparts can stem the tide and reduce protests.

Some of the most common grounds for protests are shown on page 25.

PROTEST-PROOFING: 6 TIPS

You and your customers can "protest-proof" acquisitions. ("Protest-proof" is a misnomer; the goal is to be more protest-*resistant*.)

1. **Shape Right.**
   Shaping takes place early, when a customer initiates a competitive procurement. Shaping makes customers aware of the range of alternatives, through dialogue, white papers, or marketing—and explaining additional concepts and limitations.
   In government procurements, shaping activities must comply with: (a) the Procurement Integrity Act, (b) organizational conflict of interest (OCI) rules, and (c) applicable antitrust laws.
2. **Open Dialogue Between Government and Industry.**
   Avoid protests by opening communication; open and honest

OPEN DIALOGUE BETWEEN GOVERNMENT AND INDUSTRY

MISCONCEPTION: *"A protest is something to be avoided at all costs—even if it means the government limits conversations with industry."*

FACT: *Restricting communication won't prevent a protest, and limiting communication might actually increase the chance of a protest—in addition to depriving the government of potentially useful information.*[2]

(per Reference 1)

debriefings will reduce protests considerably.

3. **Don't Preclude or Be Precluded.**
According to Dave Nadler, a partner at Dickstein Shapiro LLP in Washington, D.C., protests can begin when the government releases a defective request for proposals. Review the RFP with an eye to unclear, ambiguous, and unduly restrictive text, especially text specifying a brand name or based on a specific product. "It is better to seek clarification and use the Q&A process to make sure the solicitation is clear and that your interpretation is reasonable than to file a protest," Nadler said.[3] If you are precluded, speak up early, and write to the procuring contracting officer (PCO).
4. **Make a Clear RFP.**
Clear proposal instructions (Section L) and evaluation criteria (Section M), reduce evaluation team confusion. If the RFP is deficient and you choose to protest the RFP, you must file your protest before the proposal is submitted. Otherwise the GAO will rule that your protest is untimely and will summarily dismiss it, Nadler said.[3]
5. **Comply With the RFP & Provide Proof.**
Shlomo Katz, counsel at Brown Rudnick LLP, reinforces that the requirements of the RFP must be followed precisely. "If the RFP requires certain documentation (e.g., résumés) or credentials (e.g., a Ph.D.), and you don't provide what was required, and the agency selects you anyway, that may be grounds for a successful protest. If you make technical claims, back them up with data, especially if you are claiming your widget is twice as good, twice as fast, twice as durable. Ditto, if you claim you can deliver in half the time of your competitors. Explain your technical approach in sufficient detail to justify that you are the best," said Katz.[3]
6. **Show Cost Realism.**
You can also have protests related to your proposed costs. According to Katz, "If your cost/price is significantly higher than your competition's, make sure you explain the value proposition. If your cost/price is significantly lower, make sure you explain why it is realistic. I had a protest where the agency selected the offerer whose cost was way below the government estimate, and GAO threw out the award because the proposal did not prove its own cost realism."

Most of these strategies are best practices used in capture and proposal development processes to increase Pwin (probability of win).

PATH FORWARD

In the July 2014 APMP *Closing the Procurement Gap Survey Report*, government responders had strong negative views about protests: "Stop protesting every deal. Identify issues, concerns, and worries, but stop protesting to gain IDIQ awards, drag out new contract starts to maintain revenue, or attempt to thwart procurement."

Given the strong need for action, government and industry can reverse protest trends with these tactics:

MAKE A CLEAR RFP

MISCONCEPTION: *"The program manager already talked to industry to develop the technical requirements, so the contracting officer doesn't need to do anything else before issuing the RFP."*

FACT: *The technical requirements are only part of the acquisition; getting feedback on terms and conditions, pricing structure, performance metrics, evaluation criteria, and contract administration matters will improve the award and implementation process.*[2]

GOVERNMENT PROTEST CODE OF CONDUCT

7. **Make the Right Decision.** Select the best contractor for the job. Don't let the legal and contractual pressures bias your judgment. Don't select the contractor based on it being perceived as the most "protest-proof."
8. **Train, Train, Train.** DOD has a solid source selection FAR Part 15 process and policies. Human error is the likely reason for a process mistake. Many customers do train evaluators and PCOs. However, considering turnover and the reality that many evaluators are inexperienced—it's usually an assignment rather than a career job—extensive training is required. Bob Lohfeld, CEO of Lohfeld Consulting, has commented that due to earlier retirements and reductions in force, government contracting officers are often overworked and underpaid. Experience and training are critical.
9. **Make it Elite.** Being an evaluator is difficult and painful work. This duty should be an honor, and those who perform well should list this as a valued achievement on their résumés. Proper evaluation performance should be held up as a career enhancer and rewarded.
10. **Openly Communicate.** According to Eric Gregory, vice president at Shipley Associates, open communication and dialogue with industry are critical. Fear of a mistake can reduce communication, with the negative effect of increasing, not decreasing, protests.
11. **Simplify and Iterate Section M**. The more complex the RFP and proposal submission, the greater the chance of a mistake. Since clear Section M evaluation criteria are central, perhaps more draft RFPs should include the Section L and Section M for industry to comment and input. Most agencies issue major RFPs infrequently. Best practice is to red team Section M evaluation criteria to ensure clarity.

CONTRACTOR PROTEST CODE OF CONDUCT

12. **Be Reasonable.** If you have an informal policy to protest most losses—rethink it. If the acquisition community provides a strong debriefing and has complied with the source selection process, then move on.
13. **Carefully Consider Whether to Protest.** From the APMP PIC Survey: "Develop a checklist before filing a protest. Force yourself to answer whether *the agency violated procurement integrity rules and, if so, which ones.* Force an internal pass/fail on protests to avoid knee-jerk reactions to losing. Require your CEO to approve filing protests."

As a community, DOD contractors and acquisition agencies can improve and slow down the trend of increasing protests. If agencies and contractors follow the tips provided, proposals can win contracts the first time, with fewer protests. By closing the execution gaps identified in this article, it will be a win/win/win for bidders, acquiring agencies, and end users. It is not possible to "protest-proof" a proposal, but together we can all make procurement more "protest-resistant." Increased speed at lower cost is the ultimate responsibility we all have to U.S. taxpayers.

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This article reflects the personal opinions of Jay Herther. He is not a lawyer, and this article is not a substitute for legal advice. Herther accepts responsibility for the content and accuracy of the information contained and compliance with copyright laws. The article is not a statement on behalf of BAE Systems and does not necessarily reflect the opinion or practices of BAE Systems.

Jay Herther, director of business winning for the electronics systems sector at BAE Systems, is a growth leader with more than 25 years of experience leading capture/proposal teams with an 80 percent win rate totaling more than $10 billion. He can be contacted at + *jay.herther@baesystems.com.*

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Developing the Next Generation of Proposal Writers

By Jody Alves

It has been well-documented by APMP in the past few years that the majority of today's proposal professionals "fell" into the industry (see APMP Journal, Volume I, Number I, "How We Got Here"). Precious few chose this profession or entered it with the specific skills needed to do the job. Perhaps then it is not surprising that GTECH Corporation often has difficulty finding good proposal writers. After all, being a good writer is not always enough.

Through close collaboration with the University of Rhode Island (URI), GTECH developed a proposal curriculum, first as a project within Writing and Rhetoric classes and then as a semester-long class. In doing so, GTECH sought to create a pipeline of talent it could tap as writer positions opened.

PROVIDE CONTEXT

Students lack awareness of the role of the business proposal. Liken it to term papers they submit for grades, and they quickly understand its role in winning business. By describing how proposals receive evaluations and scores just like their papers do, you immediately make it real. The other reality students need to understand is the writer's role in producing a proposal. They learn how individual writing assignments are really part of a team effort that requires collaboration, communication, and commitment to process.

TEACH YOUR BRAND

The key to this program is teaching the basic proposal skills along with GTECH's specific processes. In doing so, the program can build a pipeline with GTECH-ready talent and also prepare the U.S. workforce's next generation with the basics for entering this profession.

CREATE THE RFP

Each class receives an RFP on which to base the proposal project. In the most recent semester class, the first project was based on an RFP from the university for a dormitory cleaning service. Three groups of students, each with an appointed lead, would compete for the business. The RFP contained an overview of the issuer's objectives and scope and services as well as elements seen in GTECH's RFPs including: executive summary; corporate capability; products and services; research; marketing; and implementation.

The students also received an evaluation sheet indicating the maximum available points and the proposal development requirements.

TEACH THE SKILLS

The real lesson comes when students understand that there are skills they will need to learn and master before they are capable of writing a compelling proposal section. For example, students were first taught how to evaluate RFP requirements. They quickly caught on to the fact that one cannot write a winning proposal without understanding what the RFP issuer requires.

Students then learned the basics of proposal writing: writing to customer needs and not oneself, using active language and short sentences, and incorporating strategic messaging. They performed research and identified and interviewed experts. Individual and team progress was reviewed, and students were provided feedback.

Each group submitted a written proposal and prepared an oral presentation of its offering. Those were evaluated and provided feedback for improvement, and the “winning” proposal was identified.

TEST THEIR SKILLS

The class’ second project offered no RFP. Instead, students were asked to recommend a product or service that would benefit but does not exist at URI. Not only did the structure and quality of their proposals reflect the skills they had learned through the first project, but their ideas are being considered for implementation at URI.

The program was able to offer a summer internship to one student from each class. Students interviewed and took the same writing test that GTECH gives candidates for full-time writing positions. Selected interns received hands-on experience with writing and providing support throughout the department.

EXPAND THEIR KNOWLEDGE BASE

This program also exposed the students to different kinds of proposals. A special grant proposal class featured presentations by URI President David M. Dooley, Ph.D., and Betty Vohr, M.D., of Women & Infants Hospital, both of whom spoke of proposal writing to support their research. Daniel Kerzner of the Rhode Island Foundation, a former professional storyteller, discussed the pros and cons he sees in the proposals he evaluates. Students also learned about APMP and were directed to its website to learn more about the industry.

Scan this QR code with your mobile phone to hear what our students had to say:

GETTING STARTED

Establishing such a program requires collaboration. In this case, it began with GTECH’s director of global talent acquisition, who opened the door to URI through the Office of Experiential Education. That office’s coordinator identified the Department of Writing and Rhetoric as one whose students would be receptive to this kind of curriculum. ●

Jody Alves is a senior proposal specialist at GTECH Corporation in Providence, Rhode Island. She can be reached at + *jody.alves@gtech.com.*

THE APMP Procurement Improvement Committee Kicks Off

Robert E. Lohfeld, CF APMP Fellow, CEO of Lohfeld Consulting Group Inc. and committee chair, talks about a year's worth of progress improving the procurement process

By Melanie Bracey

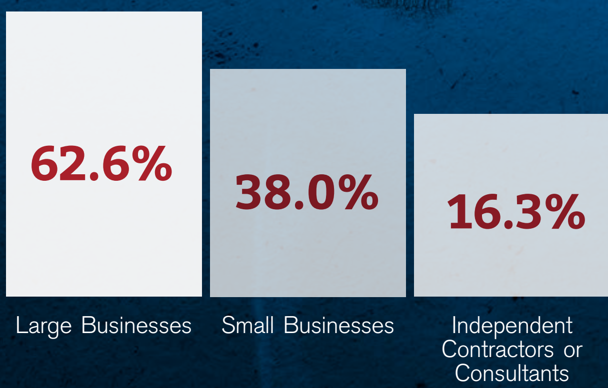
"Procurement improvement is a journey that is never-ending," says Robert Lohfeld, CEO of Lohfeld Consulting Group and head of the APMP Procurement Improvement Committee (PIC). Making that journey the very best it can be is at the heart of an ongoing effort by the committee made up of a volunteer group of APMP members, who champion better communication between industry and government at every step of the RFP-to-proposal life cycle. The idea to launch a committee was borne last December out of a conversation between Lohfeld and APMP Executive Director Rick Harris about the ongoing debate on procurement reform. "We felt someone needed to stand up and tell the world that the Federal Acquisition Regulations are fine: what is broken is how they are being interpreted and used," Lohfeld says. "It was a challenge I couldn't pass up."

The establishment of the PIC was the result of members seeing a range of procurements, some well executed and others

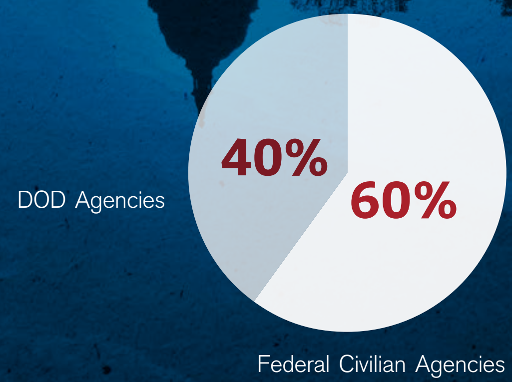
Who's Who in the Results

More than 500 government and industry procurement professionals participated in the Closing the Procurement Gap Survey. Government respondents included both those in Department of Defense agencies and those in federal civilian agencies. Industry respondents crossed the spectrum from large to small businesses as well as independent consultants and contractors.

Industry Respondents



Government Respondents



that weren't. There was a desire among APMP members to have an effective, efficient, and consistent procurement process. While the existing Federal Acquisition Regulations are acceptable guidelines, inconsistent interpretation and application of those regulations tend to create problems. APMP established the PIC and sought feedback from government and industry professionals to address the concerns regarding the current procurement process.

The PIC is made up of five subcommittees and headed by a chairman, the position Lohfeld currently holds. The five subcommittees are responsible for the following:

- Understanding the problem.
- Developing the position.
- Starting the dialogue.
- Reporting the results.
- Participating in an annual procurement improvement conference.

While each subcommittee has its own set of responsibilities, Lohfeld explains, they work as a unit toward common goals: "to propose actionable recommendations to increase standardization, reduce cycle time, decrease costs, and have fewer protests." Improvement efforts have been ongoing for quite some time, even before the establishment of the PIC; Lohfeld expresses that there is not a definitive end to the improvement process. The purpose of the PIC is to streamline those conversations and help bring to the forefront the policies and procedures that are most successful. "What we must do," Lohfeld says, "is continually strive to educate all participants in those practices that produce outstanding results."

To bridge the gap between industry professionals and government agencies, the PIC just published the results of a survey of more than 500 industry and government personnel. That data provided the specific procurement areas that need improvement. Also in development for release in November is a best practices guide for competitive government procurements. Lohfeld is hopeful that these reports will be distributed in government procurement circles as well as industry circles, as the information derived from these reports is beneficial to the procurement processes in both sectors.

"Our most pressing issue is getting the message out to people in government procurement that we have excellent information on how to improve procurements and that we want to open up a dialogue with government agencies to collaborate on procurement improvement," Lohfeld explains.

There are many potential hurdles when undertaking a project as complex as procurement process redevelopment, but Lohfeld is excited about the progress that has been made, and he is quick to say it is because of the commitment of the committee's leaders. "Without these dedicated individuals, we could not have accomplished all that we did," he says. The involvement on the government end has been positive as well, with the committee experiencing no pushback and being welcomed by government procurement personnel who are equally as passionate about the committee's mission.

With a new year on the horizon, Lohfeld and the PIC must look ahead. Lohfeld is optimistic about the role the APMP will play, acting as a voice for those in business development, capture management, and proposal development. It is an opportunity for APMP to spearhead the improvement of the procurement process for both government and industry professionals, and the outlook is good for continuing the long-term conversations among all partners.

Lohfeld's long-term goals intend to build on those conversations and establish relationships with government procurement organizations. It is important, he says, "to be good partners and help educate the government about how its actions affect our corporate organizations and our personnel." Within the next year, the PIC plans to focus on the relationships it has with procurement industry professionals and "act as champions for [its] member companies," Lohfeld says. The PIC will then be able to speak on behalf of these organizations that experience difficulty in the procurement process, alerting the government to the issues. Lohfeld is hopeful that having this structure in place will allow for continued success and cooperation within the industry. ●

For a few tips from the PIC, go to *videos.apmp.org/lessons-learned-from-the-field-3-winning-tip*.

Melanie Bracey is an editor and writer with APMP's publishing partner, The YGS Group.

The results of the Closing the Procurement Gap Survey established that members from both government and industry recognize the need for an overhaul of the current procurement procedures. The results from the survey were categorized into five overarching themes: improve government and industry communications; increase collaboration to mend government and industry relationships; use the appropriate Source Selection method; improve the RFP quality and release process; and stop the protests. Survey participants voiced their recommendations.

Improve Communications

Industry Participant

"Emphasize from the top that there is no prohibition against meeting with industry. As a matter of fact, such communication will increase competition."

Government Participant

"More actual information from industry [in response to RFIs] could focus government expectations and allow concrete progress from acquisitions."

Mend Relationships

Government Participant

"Written debriefing letters are too guarded and usually only state that the losing offeror's proposal did not represent 'best value.' That response almost always begs a protest. [Face-to-face or telephone debriefings are better.]"

Industry Participant

"Stop lawyering up [for debriefings]. Let us have a verbal dialogue and be forthcoming."

Appropriate Source Selection

Industry Participant

"LPTA is often misused. LPTA is a wise choice for commodity solutions and best value is most appropriate for all others. LPTA often results [in] poor solutions and contract cancellation …"

Industry Participant

"LPTA encourages bidders to provide the most scaled down solutions possible with the expectation that the full solution will be provided through change management processes. The government should be looking for the best solution, not the cheapest, because what appears to be the cheapest never is."

Improve RFP Quality & Release Process

Industry Participant

"Frequent communication with industry over the true release date is very important. If the government knows it is going to miss a deadline, they should let industry know right away so that we can adjust our plans and budgets to accommodate the revised release date. Otherwise, industry ends up exceeding proposal costs unnecessarily."

Government Participant

"The government needs to do a better job communicating [RFP release] schedules to industry. However, this is not as easy as it sounds due to the dynamic environment."

Stop the Protests

Industry Participant

"A clear RFP is the first defense against protests."

Anonymous Participant

"Which side is willing to put the 'us' back in 'trust'? The vicious cycle of protests leading to less information shared at debriefings, leading to more protests has to end."

IMPRESSIONS

Time Out for Better Proposals

Sally Jacques, CP APMP, is part of a seven-member team that has six sessions away from the office each year, plus a year-end planning session. *APMP Journal* asked her about this.

APMP: How is it possible to take the entire proposal team out of the office this often?
Sally Jacques: Put simply, we've seen the value. Away from everyday deadlines and demands, we can debate our processes, take time to do practical exercises to improve our work, and bond as a team. Time-outs have made our team robust and more able to prove our worth to the business.

APMP: Tell us about the team building.
SJ: We split the responsibility for the sessions, and each person has a long-term project, such as creating an easy aid guide to RFPs for salespeople. We start each session with a team builder.

APMP: What have been your best discussions?
SJ: Our best discussions have come from debating our purpose. We used Simon Sinek's TED talk about the Golden Circle as a starting point. Now we have a great elevator speech.

APMP: How do you improve skills without bringing in outside trainers?
SJ: We get practical! Our proposals give us a wealth of material for writing and presentation exercises. I keep a folder of nasty slides with 100-word sentences and the ones that make you go "What the ...?" Then in our sessions, we decide what's wrong with the writing or slide, and we re-do them there and then.

Team Building Ideas

Write the ending and design the cover. Get a range of books (i.e., fiction, nonfiction, and children's) and give the team members only the book's opening paragraph. Now ask them to write the end of the story and to design a cover. Then reveal the book. This also builds proposal skills, as each proposal is a story.

Learn more about each other. Ask all the team members to bring something that tells more about themselves. It can't be anything obvious. These items are confidentially given to the facilitator, and everyone leaves the room so that the items can be placed in view. Then everyone has to put a name to each item. When it's disclosed whose item is which, the person explains why he or she brought it.

APMP: Where else do you get ideas?
SJ: We search the APMP Body of Knowledge for ideas, show TED talks, find websites or newsletters with tips. I've found articles in the APMP Reporter for the team to discuss, and I also like Ann Wylie's newsletter.

Try taking some time out and see what it does for your proposals.

Sally Jacques, CP APMP, is the editor for proposals and presentations at Standard Bank South Africa, runs the time-out sessions for her team, and is the chair of the South Africa APMP Chapter. She can be reached at + *sally.jacques@standardbank.co.za.*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