

# Journal

VOLUME V NUMBER I // 2017



Your Professional Guide to Winning Business



APMP PRIORITIZES  
OPPORTUNITY  
MANAGEMENT  
PROFESSIONALS

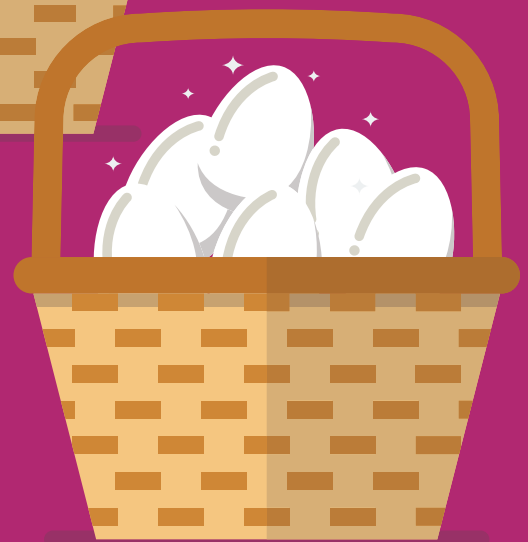
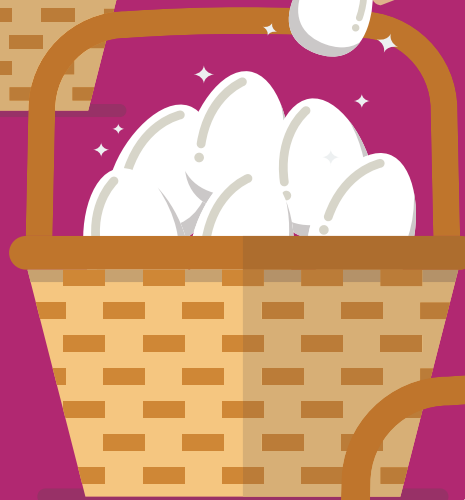
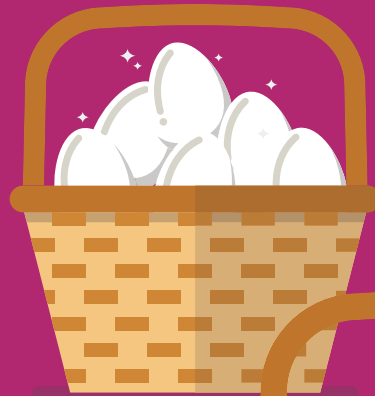
COMPLIANCE IS NOT  
A FOUR-LETTER WORD  
AND WHY YOU SHOULD  
TAKE IT SERIOUSLY

DEVELOPING A PROCESS IN  
AN ESTABLISHED BUSINESS

BRINGING CERTAINTY TO  
OUR VOLATILE WORLD

AGILE METHODOLOGY IN  
PROPOSAL DEVELOPMENT

## A CASE FOR DIVERSIFICATION IN PROPOSAL CONSULTING



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## Cover Story

# 28 //

### A CASE FOR DIVERSIFICATION IN PROPOSAL CONSULTING

The ever-revolving doors of new budgets, priorities, and regulations can affect the livelihood of government proposal contractors. So, transitioning into the commercial market is not only a smart move, it's the right move.



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Diversification comprises differences in language, culture, and time. Meaningful opportunities can blossom through these means for proposal professionals, but process and value must be taken into consideration.

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## GIVE THE PEOPLE WHAT THEY WANT

**M**any of us first heard the phrase “Give the People What They Want” in 1981—on, of all places, the front cover of an album by the British rock band The Kinks. I think about that phrase a lot and often apply it to business.

The message is clear. Listen to the people around you, and they will tell you what they want. People have an amazing ability to share how to make something better—some more gracefully than others, but it’s the positive outcome that counts. When people tell you what they want, it is up to you to listen and execute.

APMP has made significant changes over the last five years because we’ve listened to our members. As a result, our membership has more than doubled, our certification program is envied by other associations globally, and we are growing financially by more than 10 percent each year. All of this is happening because we are giving the people (APMP members) what they want.

Our latest Give the People What They Want project is at APMP’s Bid & Proposal Con 2017. The changes in 2017 will be subtle but impactful, largely because our members suggested them.

Last year’s Bid & Proposal Con attendees told us loud and clear that they wanted more interactive discussions, more panel discussions, and more Q&A. As a result, 70 percent of our sessions this year are either interactive or panels. Audience members will participate in more exercises, town hall discussions, and Q&A sessions. Members will be sharing, connecting, listening, and learning from speakers and each other more than ever before.

The remaining 30 percent of our educational content will be the traditional lecture presentations.



The strategy to increase interaction time among APMP Bid & Proposal Con attendees is already paying off. In the first two weeks of our 2017 registration drive, we were 56 percent ahead of where we were last year.

To make sure that you are a part of this new interactive APMP Bid & Proposal Con educational agenda, which you helped design, register today at [APMP.org/?page=neworleans#reg](http://APMP.org/?page=neworleans#reg).

Who would have ever thought that those six words sung loud and proud by The Kinks 36 years ago would be a driving force behind the constantly evolving APMP? ●

**RICK HARRIS, CF APMP**  
Executive Director  
+ [rick.harris@APMP.org](mailto:rick.harris@APMP.org)

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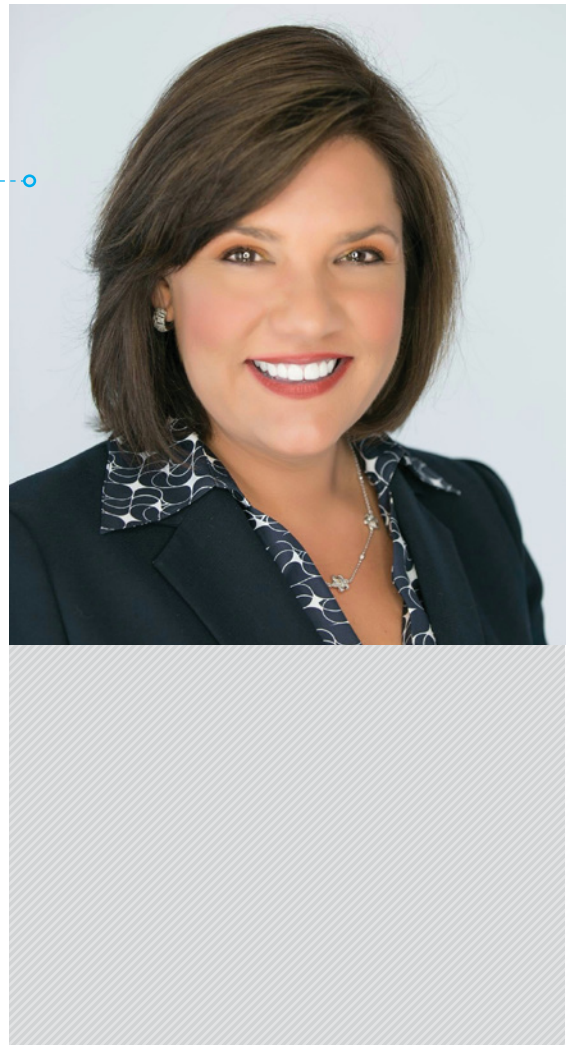
## PATH TO PROFESSIONALISM

**L**ike some, if not most, of you, I entered the proposal profession through experiences that happened to me, not through the intent to embark on this specific professional career. However, after my accidental entrance, I made choices to travel this career path, and I now find myself filling the chairperson's role of the Association of Proposal Management Professionals. It's an honor that I value highly, and I'm pleased to share that we have started 2017 with tremendous momentum.

The profession is gaining recognition and being distinguished like never before in its history. Our membership roster is growing around the globe and across industries. Companies are sending their entire proposal teams to complete APMP certification and participate in our educational offerings. Our chapters are thriving, and we are investing in the kind of growth that will establish APMP as the premier assembly for those who do what we do. It's really an exciting time for all of us!

This momentum matters. It matters to us as a profession, to be sure, but it also matters to each of us as individuals. Companies are seeking employees who have demonstrated competencies in proposal and bid management and business development by accomplishing APMP certification. If you haven't made time to complete your APMP Foundation-level certification, I urge you to clear the space on your 2017 calendar to invest in yourself and ride the wave of momentum happening in our profession right now.

If you've already completed your Foundation certification, look for other ways to up the ante on your professionalism this year. Did you know that APMP's monthly webinars are on demand, so you can still watch if you're tied up when they happen live? Or take this issue of the *APMP Journal*—dozens of your peers and thought leaders in the industry have contributed to bring you the information you need to remain on the cutting edge of best practices.



APMP offers many ways for you to get involved and define how you fit in this rewarding profession. It's time for you to make intentional choices to pave your career path and increase your professionalism, and I'm here for you as you embark on your journey. ●

**KRISTIN DUFRENE, CPP APMP FELLOW**

APMP Chair

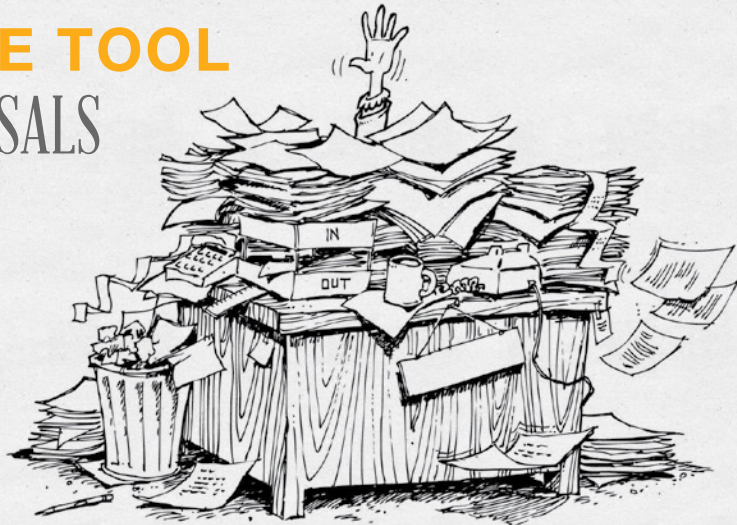
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**APMP BOARD OF DIRECTORS**

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Contributors to *APMP Journal* hold their own points of view that may not be representative of the APMP Body of Knowledge, an online wiki-type resource which is the association resource for industry best practices.

# ASSOCIATION NEWS

## APMP BOARD FINALIZES ITS THREE-YEAR LONG-RANGE PLAN

**A**PMP's board of directors announced in January that it has finalized its three-year long-range plan, with membership and certification growth at the top of the priority list.

"Our board met in December 2016 and wrote a plan that will take us through 2019," said APMP chair, Kristin Dufrene, CPP APMP Fellow. "We met for a full day and developed aggressive long-term strategies in the areas of membership, marketing and communications, certification, Bid & Proposal Con, surveys and research, governance, finance, and administration. It's fitting that membership and certification are our two highest priorities because membership success is driven by APMP certification success," she said.

One of the goals coming out of the meeting was to increase APMP's size to 10,000 members by December 2019. APMP's membership has grown at an average rate of 815 members annually since 2011.

Other key metrics for 2017 include:

- Create new member promotional videos for APMP and chapter use.

- Conduct an APMP member survey.
- Create compensation surveys and reports in two countries outside of the U.S.
- Set up separate membership and marketing committees.
- Study ways to repurpose thought leader content and push it out to related industries to help educate potential members about the bid and proposal profession and its industry.

This is the third time the APMP board has met to discuss its long-range plan. The first time was in 2012 in Atlanta, Georgia, followed by a 2015 meeting in Worcester, Massachusetts.

"APMP long-range planning meetings are directly tied to APMP's growth over the last five years," said Dufrene. "Board members come together and share their ideas, and we execute those ideas. Those meetings are the reason we doubled in size so quickly," she said.

APMP will monitor the progress of its long-range plan at every board and executive committee meeting to make certain the association is on track and meeting its goals. ●

## APMP BOARD OF DIRECTORS APPROVES TITLE CHANGES OF OFFICERS

**A**fter 28 years, the APMP board of directors voted to change the board leadership titles to better represent traditional association titles, comply with best practices, and better outline the responsibilities of the volunteer officers. The new title changes include:

- The chief executive officer has been renamed the chair.
- The chief operating officer has been renamed the vice-chair.
- The past CEO has been renamed the past chair.

The APMP treasurer and executive director (non-voting) positions will retain their same titles.

"We made these changes to be consistent with association naming conventions and best practices," said

Kristin Dufrene, CPP APMP Fellow, APMP chair and vice president of proposal development at Engility Corporation. "The legacy titles served our organization for 28 years, but now that we have a team of paid staff who run the day-to-day operations of the association, we knew we needed to adjust. This change demonstrates our growth as an association and an industry."

The APMP international board of directors unanimously voted on the title changes following a recommendation from the APMP Executive Committee. The title changes affect the APMP International Executive Committee positions only. Each chapter may still use its legacy titles as it sees fit and by approval of its own chapter board. ●





# Best informed wins...

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- Proposal managers and coordinators
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- Proposal writers and editors
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- Desktop publishers
- Color team reviewers
- Orals coaches

## Winning support...

- Go-to-market strategy and execution
- Pipeline development
- Capture and proposal process consulting
- Capture readiness and management
- Pre-proposal preparation
- Proposal management, writing, and review
- Professional training

## Professional training...

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



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# 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

12 //

## 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

# APMP Prioritizes Opportunity Management Professionals

By Christina Lewellen

AS PART OF the long-range plan adopted in late 2016, the APMP board of directors set a goal to identify areas for expansion into the opportunity management realm of the industry. Serving capture and business development professionals has been an evolving goal of the association, and the leadership aims to invest additional resources into serving those who specifically deal with opportunity management efforts.

“There are so many opportunities to work toward alignment of the capture and business development professionals with their counterparts in the proposal management section of the pipeline,” said Rick Harris, APMP’s executive director. “The APMP board recognizes that further supporting the entire opportunity management life cycle will not only benefit APMP’s members but also raise the bar of the entire industry in terms of effectiveness and best practices.”

APMP has added to its permanent lineup at the Capture and Business Development Conference, hosted near Washington, D.C. This year’s event will take place on Friday, Dec. 8 at the Ritz-Carlton in Tysons Corner, Va.

APMP has also included in its monthly webinar lineup several opportunity management topics, including a session marketing to the federal government and several sessions exploring how winning in the evaluation phase starts in early opportunity management efforts.



APMP’s webinars are available on demand at no cost to members.

At this year’s Bid & Proposal Con event in New Orleans, APMP will present more than a dozen sessions focusing exclusively on capture and business development, including:

- KISS: A Better, Simpler, More Actionable Proposal Lessons-Learned Approach.
- Incumbent vs. Challenger: Who Has the Edge?
- To Your Heart’s Content: Develop Content Libraries That Cut the Time Required for Proposals 30 percent While

Improving Win Rates 35 percent.

- Quick-Start Interview Preparation: Getting from Proposal to Presentation in 72 Hours.
- Writing to Get Past the Newbie Evaluator.
- Rapid Responses to RFPs—Turning Around Proposals in Two Weeks or Less.

Last-minute registrations are available for APMP’s Bid & Proposal Con. More information about the conference’s schedule, presenters, and topics is available at [APMP.org](http://APMP.org). ●



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# Compliance Is Not a Four-Letter Word and Why You Should Take It Seriously

By Donna M. Creason, CF APMP

THE QUICKEST AND EASIEST METHOD OF ELIMINATION IS TO EVALUATE WHO CAN FOLLOW DIRECTIONS ... OR NOT!

ALL SEASONED PROPOSAL professionals have experienced a variety of proposal antics and snafus. Working in the industry long enough, one develops a tough skin for it.

Noncompliance with proposal requirements is one such area of abuse. Whether this lax view of compliance is from inexperience or from an unashamed disregard for protocol, it must be corrected.

Companies are winning proposals every day. And in most cases, the wins are directly related to how well the companies follow the customer's lead. If you are in the business of writing competitive proposals, you should comply with the customer's requests. Sounds reasonable, right?

But many businesses do not. They deliberately ignore the instructions and still expect to win.

## MANY ARE CALLED, FEW ARE CHOSEN

*Separate the wheat from the chaff.* Some people believe the amount of detail in the RFP is the customer's way of irritating proposal professionals and making their lives more difficult. Others believe it is important for the customer to provide as much detail up front to identify the best resource for the intended work. (Hint: This is more realistic.)

Instead of viewing compliance as restrictive or punishing, it's helpful to move to the other side of the table to understand how the evaluator might see it.

All decision making starts with elimination. Don't blame the evaluator. In fact, it would be more valid to blame the brain, since it is the tool everyone uses to make thousands of eliminations, daily.

Initially, the evaluator is not looking to select a winner; it is too early for that. He is trying to eliminate the losers. And what do you think is an effective way to separate the wheat from the chaff?

Compliance (aka directions, instructions).

The quickest and easiest method of elimination is to evaluate who can follow directions ... or not!

DEEMED APPROPRIATE FOR REVIEW OFFERORS – INDIVIDUALS OR FIRMS THAT SUBMIT A PROPOSAL – ARE CONSIDERED “RESPONSIVE” IF THEIR PROPOSAL HAS BEEN PREPARED IN FULL COMPLIANCE WITH THE REQUIREMENTS OF THE RFP. THE EVALUATION COMMITTEE CANNOT EVALUATE PROPOSALS DEEMED NONRESPONSIVE.

## LEFTOVERS: YOU EITHER LOVE 'EM OR YOU HATE 'EM

*Determine who is worthy to move to the next round.*

You avoid immediate rejection by following the customer's instructions. After the evaluator eliminates the weaker proposals, he needs to assess those that remain: the leftovers.

Since the leftovers all complied with the RFP instructions, the evaluator must dig deeper to review and compare some of the finer details: deficiencies, strengths, weaknesses, features, benefits, clarifications, and uncertainties.

With this narrower field, the evaluator is gathering sufficient information and evidence to make a well-informed and reasoned selection—to either narrow the field further or to determine a winner.

## I ASKED FOR BANANA BREAD, BUT YOU GAVE ME GOULASH?

*Decide who is best suited to follow through with the work.*

You stop at a bakery and order a slice of banana bread to go. The bakerista goes to the kitchen and returns with your to-go bag. You look inside the bag to see that it contains ... a bowl of goulash? Take a minute to finish that scene in your head.

Now, think about how the customer might feel when she asks you to follow her RFP instructions, and you decide to follow some and ignore others. Or even worse, you do your own thing.

If the customer asks for banana bread, give her banana bread. If she wants it with walnuts, add walnuts. If she wants it drizzled with cream cheese icing, drizzle!

Not only are you showing your ability to follow instructions, you are

building rapport. If you win the work, the customer already has a level of trust in you. When the project starts, you have laid the foundation. Now you can have that conversation about your award-winning goulash.

Takeaway: Compliance is not a four-letter word or a disciplinary action. It is a ground rule established by the customer for the benefit of the customer's investment. To win at this game, you must play by the rules and take compliance seriously. ●

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**Donna M. Creason, CF APMP**, is president/CEO of Summit Publication Design LLC. She is a quality-driven communications and management professional with 20+ years' experience in computer information systems, content creation and management, document design, and technical communication. She can be reached at [+dcreason@summitpubdesign.com](mailto:dcreason@summitpubdesign.com).

**NEW ORLEANS**  
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**JUNE 13-15, 2017**

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# Developing a Process in an Established Business

By Beth Rogness



WITH AN INDUSTRY-LEADING suite of services, an international presence, and 64 consecutive quarters of revenue growth, SPS Commerce is well on its way to becoming that billion-dollar company it hopes to be. It's amazing to think that at one point, the sales organizations were responsible for handling their own bid/proposal responses. While this process, or lack thereof, seemed to be working, in all reality the company was struggling.

The company was focused on business development. The sales organizations, marketing teams, subject matter experts—they had nothing in place in terms of best

practices when it came to answering an RFI/RFQ/RFP request. The old process looked something similar to Graphic 1.

In an already established company, the struggle is real when it comes to developing a new process. This article is based on the experience of creating a bid operations process in the Software-as-a-Service (SaaS) environment in which SPS Commerce operates, but the information should be applicable to other areas as well. Here are some key takeaways from the first eight months of building a process:

1. Define your role with your manager and create your

objectives as they relate to your company's growth objectives.

2. Build relationships with your internal teams and introduce your objectives. (Be humble and let your teams know you are training, learning, etc.)
3. Jump in and learn what your company currently does to respond to bids/requests and then offer recommendations. (While you should not be expected to take on a project right away, offering your support and building credibility will go a long way.)
4. Analyze current processes and begin establishing best practices



## WHILE YOU MAY FURTHER DEVELOP YOUR PROCESS AS TIME GOES ON, COMMUNICATION IS KEY TO STARTING OFF ON THE RIGHT FOOT.

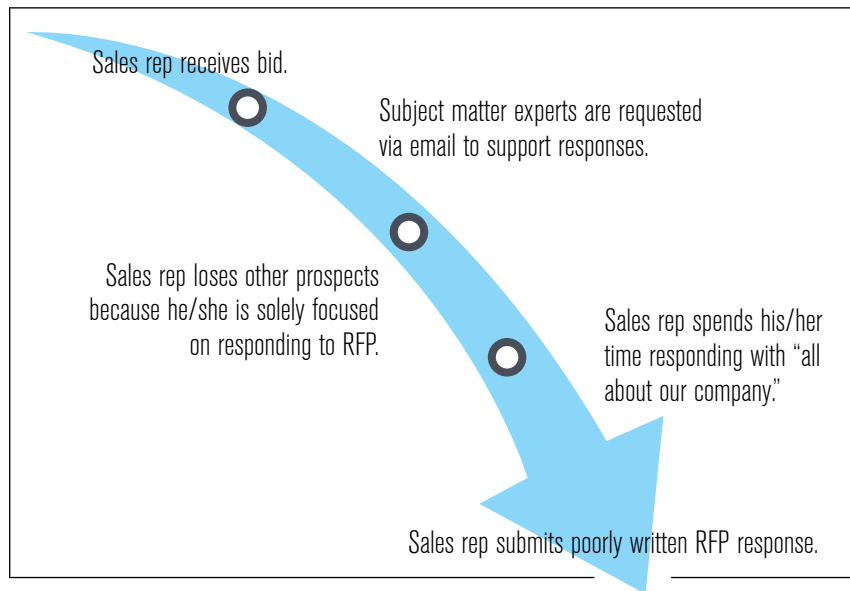
that align with your company's objectives. Make them into a repeatable process that proves to be effective and continuously analyze to improve.

While you may further develop your process as time goes on, communication is key to starting off on the right foot. Collaborate with marketing and product teams throughout the process. Graphic 2 shows SPS Commerce's established best practices and bid operations process. There are also a lot of behind-the-scenes processes and tools needed to ensure the project is completed.

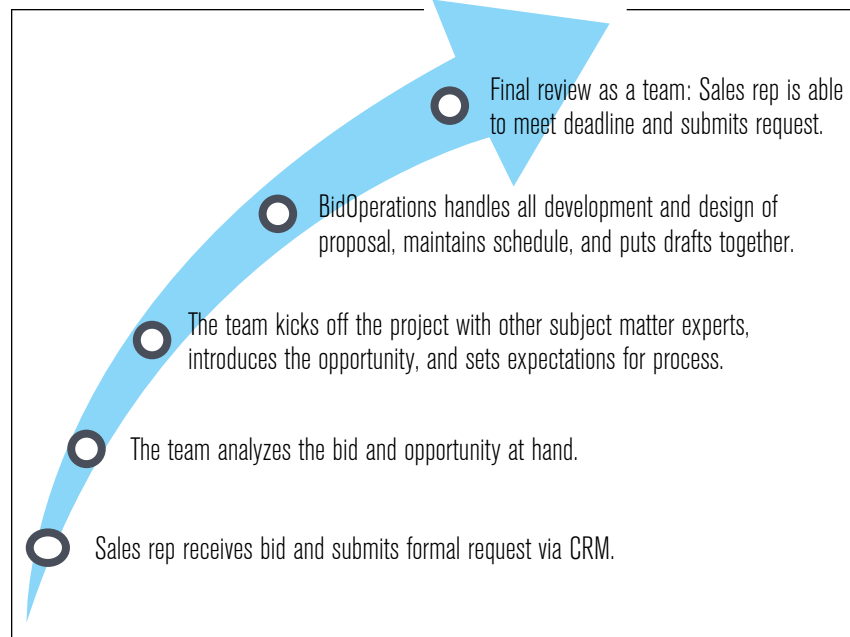
You need to make sure that the response is accurate with up-to-date information, the content of your response is tailored to your customers' needs and objectives, and you have complied with the customers' requirements. There are design aspects to consider and the organization of the response, as well as proofreading your subject matter experts' content. The list goes on. As the process continues to develop, you need to continuously keep up with internal communication and relationship building to successfully establish bid operations best practices. ●

**Beth Rogness** is an associate sales operations analyst at SPS Commerce. She can be reached at 612-435-9556 or [+ earogness@spscommerce.com](mailto:earogness@spscommerce.com).

**Graphic 1**



**Graphic 2**



VUCA

# Bringing Certainty to Our Volatile World

## FIVE TIPS FOR WORKING WITH COMPLEX RFPs

By Sally Jacques, CP APMP



According to Wikipedia, the term *VUCA*—an acronym for volatility, uncertainty, complexity, and ambiguity—was introduced by the U.S. Army to describe a post-Cold War world.

IT'S A VUCA WORLD. WHEN FACED WITH THIS AMOUNT OF CHANGE, IT'S NATURAL TO SEEK CERTAINTY AND UNDERSTANDING.

**SALLY JACQUES, CP APMP**, who works mainly on commercial proposals at Standard Bank South Africa, reflects on her experience of how RFPs are becoming more complex as clients demand certainty. She shares her five tips to ensure our proposals do just that.

From every angle, we're being thrown into a world where everything is changing: politics, economics, predicting the future, even raising our children. It's a *VUCA* world. When faced with this amount of change, it's natural to seek certainty and understanding. We want to know that if we do something now, it will have sure consequence for the future—despite history repeatedly disproving this theory!

In the world of proposals, we're seeing RFPs becoming more complex as our clients demand certainty.

### GROWING COMPLEXITY

For organizations who understand their complexity—be it from a changing environment, mergers, or new regulations—the result is a highly complex RFP. Sometimes these RFPs seek simplicity for complex issues: for example, asking for the same service across a number of countries in a single RFP. I work in the world of banking in Africa, where 14 countries mean 14 banking regulations, 14 currencies, and 14 market conditions.

Along with the complexity come detailed questions. No longer do our clients ask if our banking systems

can connect to their accounting systems. Now, they want to know exactly how that happens, when it happens, and what we will do if something goes wrong.

Not only are our clients asking detailed questions, they want proof that we can do what we say we can do. It is not enough that we have a valid banking license. Documentary proof that we participate in certain industry forums is demanded. The audit report we publish as a company listed on the stock exchange is not enough. Audit reports are required for specific products and processes.

### FIVE TIPS

So, what is our response? Being blinded by the *VUCA* headlights is not the answer. Here are my five tips:

1. **Offer certainty.** Look for ways you can give your clients certainty, such as fixing pricing over a three-year period when you usually give annual price increases. If you can't do this, then at least offer the illusion of certainty, with a clearly set out compliance matrix and a well-organized proposal.
2. **Reduce ambiguity.** Answer questions succinctly and don't

give your client too many choices. Sometimes offering a couple of options makes sense, but recommend one of them. Give evidence that you can do what you say you can do. Include case studies and graphs to illustrate your solution. Distinguish between simplicity and complexity. A client may want a solution that is simple for end users, but you have to demonstrate you can deal with the complexity of installing the back end. A complex solution written in clear and simple language will more likely be understood.

3. **Engage**—with both your clients and your internal

stakeholders. If you haven't built a relationship with your client before the RFP is issued, you are probably out of the running. After all, in this VUCA world, do you want to deal with an unknown entity? Your internal subject matter experts have to know that their vague answers of yesteryear won't cut it. Customization of each answer is even more important today.

4. **Be flexible**—and constantly review your processes and approaches. The solution that worked brilliantly for one client may not work for another, even if those clients are in the same industry.

5. **Be brave**—and challenge what you are given. There remains room to challenge your clients on demands for unreasonable certainty that could put your business at risk. And be brave on who you bring into your team. It is not the time to reject new graduates just because they don't have the experience you are looking for. Hire on their ability to navigate a VUCA world. ●

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# MLA, APA, WTF?

## CITING SOURCES IN PROPOSALS

By Karen Kosloff, M.A., CF APMP



ANYONE WHO HAS written a research paper will remember it, perhaps with fondness or more likely disdain: the bibliography. In academia, the ritual of citing sources is carefully regulated through precise style standards.

The Modern Language Association (MLA), American Psychological Association (APA), and Chicago Manual of Style (CMS) provide different guidelines for writers, depending on the field of study. Although tedious, formal citation is critical to upholding the integrity of academic writing—a writer is obligated to credit other authors for their work. Plus, citing other experts supports your argument and bolsters your credibility.

This practice of citation is also important in proposal writing, particularly in the commercial sector where persuasive writing comes into play and writers have a touch of creative liberty. Trust and credibility are prerequisites for persuasion. How can a reader trust your claims are true—let alone be swayed—if those claims aren't backed up with evidence? That's where citing sources can make a big difference.

### USING SOURCES TO BUILD CREDIBILITY

Sources can make a powerful impact in your proposals. Citing sources strengthens the credibility of proof points, those key messages that communicate unique value. Have you ever seen a company described as “world-class” or an “industry leader” or products touted as “top quality” or “best of breed”? Do those claims pique your interest,

or are they a turnoff? What if the product comes with the Good Housekeeping Seal or the company is recommended by *Consumer Reports*? Adding credible sources transforms empty assertions into impressive proof points.

### WHEN AND WHAT TO CITE

Proposal writing involves many different kinds of information that can be traced to original sources—customer testimonials, CEO statements, snippets of language from industry reports, competitive comparisons, and graphics highlighting your organization's proof points. Any information that can be proven or traced back to an original source should be cited. Consider these statements and how they could be made stronger with sources:

- “Our customers say that we're easy to do business with.” Don't just state it—prove it. Get permission from a previous customer to use a specific testimonial that explains how you were easy to do business with.
- “We're No. 1 in sales.” According to what source? Provide a comparison graphic to support this kind of data-based claim.
- “We've earned very high marks from all of the financial ratings agencies.” Add a footnote with the external sources and dates—or better yet, highlight your company's favorable ratings in a callout box, with the sources captioned below.

### CITATIONS FOR PROPOSALS

Once you understand the different types of information that need to be cited, the next step is knowing *how* to cite sources. Move over, MLA, APA, and CMS—this is how to handle proposal citation:

- **Answer the four W's.** Ensure you are answering who said it, what was said, when it was said, and where.
- **Keep it current.** For time-sensitive or date-marked sources like a survey or report, aim for sources no more than two years old.
- **Keep it short and sweet.** No one wants to read a paragraph of footnotes. Try to keep each citation at fewer than 20 words.
- **Don't ignore internal sources.** Include company data, such as impressive metrics or high scores on a satisfaction survey, and cite your internal reporting as the source, along with the year.
- **Let content drive location.** Where to place the citation on the page depends on the content. In-text citations, footnotes, and graphics captions are all fine, as long as the reader can easily locate the source on the page.
- **Make it easily searchable.** Put your keyword hat on! If the source is accessible through a standard online search, be sure to include key phrases to make it easy to find.

## HOW CAN A READER TRUST YOUR CLAIMS ARE TRUE – LET ALONE BE SWAYED – IF THOSE CLAIMS AREN'T BACKED UP WITH EVIDENCE?

- **Mind potential media limitations.** It can be tempting to hyperlink to the source, but beware! Your audience may be reading the proposal in hard copy or another format that doesn't support hyperlink functionality.
- **Superscript vs. subscript.** Stick to superscripts, which appear above the main line of text and to the right of the noted text (e.g., No. 1 in sales<sup>1</sup>). Subscripts appear below the main text and are typically used

to denote chemistry compounds (e.g., H<sub>2</sub>O).

- **Footnotes vs. endnotes.** Footnotes list citations at the bottom of the page, whereas endnotes list citations on the last page of the document. Go for footnotes. Placing the citation on the same page enhances readability for the busy executive skimming your proposal.
- **When in doubt, leave it out.** Can it be proven or backed up with supporting evidence? If

not, it is better to omit it. If you can't prove that your company is innovative, don't state it! Bluster is easy to spot.

Incorporating citations strengthens proposals by bolstering assertions with evidence and eliminating fluff that can't be supported. Follow these recommendations to increase the credibility of your proposals and get on track to win. ●

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# Agile Methodology in Proposal Development

## A MORE ADAPTIVE, FLEXIBLE APPROACH FOR SMALL BUSINESSES

By Anna Gault Galjan

ACCORDING TO THE LATEST census data, 5.134 million businesses with up to 20 workers exist in the United States.<sup>1</sup> As nuclei for invention and growth, small businesses have long been recognized by APMP as likely to benefit from the early adoption of best practices in proposal development as part of a sound business plan.<sup>2</sup>

However, current accepted procedures in proposal management, such as Shipley, continue to emphasize a multi-resourced, single linear timeline involving a storyboard phase, a first written draft, initial review, second draft, follow-up review (red team), recovery phase, production, and submission. Similar to the “waterfall” methodology in software development, each phase is ideally encountered once, with no backtracking or repeat, with the objective of building upon the quality of the previous proposal draft. Those 5.134 million small businesses can buckle under the strain of taking a significant portion of their resources from operations to develop a competitive proposal using this method.

Agile development, adopted from the Agile software development

methodology created in 2001, presents a more adaptive approach, emphasizing continuous improvement and flexible response to change, with practices that focus on the product needs with an iterative approach.

The applicability of an Agile development approach to proposal management has been explored within the APMP body,<sup>3</sup> but those discussions have tended to favor large businesses in their (1) focus on product improvement through increased collaboration, synergy, and cross-functional teams; and (2) treatment of the process—RFP receipt through proposal submission—as one development cycle, known in Agile as a *sprint*. These key Agile components continue to elude very small businesses, who lack the large teams necessary to cover the various roles required to successfully implement these elements under Agile. Simply put, and using Agile terminology, the *product owner* (customer representative), *scrum master* (proposal manager), writer, and graphic artist are too often all the same person.

Not all opportunities demand the resourcing that a multiyear, multimillion-dollar contract proposal requires, and smaller opportunities evaluated on best value are of no lesser importance to many small businesses. Within this

framework, and with one experienced and knowledgeable writer, there are elements under Agile that can prove powerful to the very small business, still offering the iterative and adaptive approach but better harnessing the limited skilled resources available. Central to these is the Scrum Sprint, a repeatable work cycle that resolves into a finished product. The Scrum Sprint can be adapted to any length under one month and can be extremely effective for smaller tasks within a one-week time frame.

THIS PROCESS REQUIRES FLEXIBILITY IN THE AVAILABLE TEAM, SINCE THE WRITER MUST ACCESS VARIOUS WORKERS TO GATHER INFORMATION AT FOUR DIFFERENT POINTS WITHIN THE ONE-MONTH CYCLE.

Consider the example of a month-long proposal cycle, where the RFP requires the technical volume to contain a technical approach, corporate experience, and a management plan with accompanying resumes. Using a standard

1. U.S. Census Bureau, 2012.

2. Mitch Reed. *Proposal Best Practices: Fitting Best Practices into an ISO/Capability Maturity Model (CMM) Infrastructure*, May 28, 2007; Neil Cobb & Charlie Divine. *Writing Business Bids & Proposals for Dummies*, UK: John Wiley & Sons, 2016.

3. Maryann Lesnick, APMP-NCA Mid-Atlantic Conference, 2014; Wendy Freiman, *APMP Journal*, Spring/Summer 2009.

4. Kenneth Rubin. *Essential Scrum*, NJ: Pearson, 2013.

Scrum Sprint model,<sup>4</sup> the writer first determines whether all tasks can be completed within one week. If so, the writer completes planning within eight hours, performs an initial outreach to resources within the company to gather information, drafts the proposal section, relinquishes the draft for review, and completes the recovery based on reviewer feedback. (Handoffs and additional development phases are discouraged within Agile, to keep the timeline short.) There should be an opportunity for a *daily scrum* or standup, where technical resources are available for one 15-minute meeting every day to answer any questions that the developer may have and to allow the writer to report progress. The final version of the proposal section is completed in five days, and once that section

is done, the writer moves on to the next section, to meet the next deadline within five days.

This process requires flexibility in the available team, since the writer must access various workers to gather information at four different points within the one-month cycle. The process also requires the reviewers to be available at four different points, but this type of flexibility is often more realistic for brief periods for a very small business. The many advantages of this approach for a small-business proposal include:

- Rapid convergence of finalized products.
- Higher quality of writing by an experienced proposal writer.
- Uniformity of writing.
- Concurrence of facts throughout the proposal.

- Centrally maintained understanding of specific technical proposal details.
- Centrally maintained understanding of adjustments to the technical solution, in the case of either amendments or changes to technical approach.
- Reduction in resources diverted from operations.
- Reduction in reviewer feedback too late into the proposal cycle.

The very small businesses who cannot incorporate all elements of Shipley deserve their own set of best practices in proposal development, and Agile presents a number of scalable, flexible solutions for best-value bids. ●

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# It's Not All About the Dimples

## BENEFITS TRUMP FEATURES EVERY TIME

By Brad Douglas

**THE DIMPLES ON** a golf ball are the most obvious feature, and to the novice golfer, they may all seem the same. But what makes one golf ball worth \$3 while others cost less than \$1? To your average golf hacker, a ball is a ball—dimples don't matter. But consider how dimples affect the golfer. Are dimples discriminators for the product? Do they add value for the golfer? Do they address hidden hot buttons, needs, or issues?

If a salesperson said, "I'll sell you this golf ball that has 420 dimples, 75 more than the average ball, for 25 percent more than the ball you're using," you might respond, "So what? Why would I spend more just for more dimples?"

However, if the same salesperson pitched the same ball but said, "More dimples reduce the spin on your ball and will increase distance by 15 percent," value and benefits have been introduced to the equation. The salesperson addressed your two main hot-button issues of shot distance and direction (spin).

In proposal development, it is crucial to link benefits and discriminators to customer hot-button issues and requirements. To an educated golfer, the dimples *do* matter. They are discriminators and can address a golfer's hot buttons—longer drives, straighter shots, smoother putts.

### TEERING UP THE BENEFITS

There are hidden benefits that make one brand of golf ball worth three to four times the value of other golf balls. The core and cover of the golf



ball add tremendous benefit to the golfer because these features affect the launch speed off the club. The makeup of the hidden features can benefit a golfer with better ball speed, cleaner spin and direction, or more distance.

Dimples are the obvious feature. Proposal managers and writers must understand their customers' hidden issues and link benefits to the not-so-obvious features of the solution—like the benefits of a better core and the qualities of the cover.

Proposal professionals should present solutions that address the hot buttons, issues, and needs of the customer. Here is how you get past just writing about the dimples.

1. Understand the requirement *and* the underlying issue or hot button associated with it. What is the customer's main concern, issue, and motivator, and how does your solution address it?

2. Ask. Ask. Ask. When creating a response to an RFP question, dig deep for the benefit. Ask the subject matter expert or solution architect what benefit that technical response brings to the customer.
3. Present benefits before features. It's most common to present the solution and then explain why it matters and how it will address the customer's needs. Flip it. Explain the benefits first and then describe the solution.

Remember, it's not all about the dimples. Focus on the benefits that come with the whole package: the dimples and everything else that makes the ball worth the investment. ●

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# Commercial

## For Better or for Worse: Navigating the Unlikely Marriage of Proposal Professionals and Sales

By Christine Gordon, CF APMP

Building a successful career in commercial proposal management requires building strong relationships with the sales team. Ironically, the personality traits that make proposal and sales professionals each successful at what they do are the exact characteristics that can bring challenges to the relationship.

A good marriage counselor will tell you that two of the keys to any great relationship are understanding and respect. To work together in harmony, we need to understand our own personalities and needs and those of our partner, respect our differences, and seek common ground.

So, what are our personality traits and our needs, and how do they differ?

While there is plenty of space for many personality types in proposal management, it's easy to see some common traits when gathered in a room of proposal professionals.

We are often:

- Analytical and, at the same time, creative.
- Introverts, even a little shy, preferring to communicate through email instead of face to face or on the phone.
- Organized and sometimes rigid, adhering to processes that help us finish our proposals on time.
- Perfectionists, focused on details.

By the same token, there are many different personality types in

sales, but it's safe to make a few generalizations.

Sales professionals are often:

- Highly intelligent, projecting confidence (even when they don't feel it).
- Outgoing and energetic, making friends everywhere, preferring the phone over email.
- Flying by the seat of their pants, relishing a bit of chaos, pushing the envelope.
- Focused on the big picture—winning!

You can see that these traits are not always readily compatible. There are likely many times when a sales professional rolls his or her eyes when hanging up the phone after talking with a proposal manager. And we proposal professionals have braved our share of lumps from banging our heads against the nearest wall after encounters with salespeople.

Before you grow a permanent lump on your forehead, keep in mind our shared traits. Proposal managers and sales professionals are both:

- Competitive. We like to win!
- Intelligent professionals.
- Experts in our chosen fields.

- Dedicated to seeing the project through, working outside of normal business hours when necessary.

Even with our shared traits, our differences can still feel overwhelming at times, especially with a large proposal looming on the horizon. What can we, as professionals, do to keep this critical relationship on track? To foster strong relationships that will weather the most challenging proposals, consider the following practices:

- Accept your differences and focus on your commonalities.
- Use humor whenever possible. It alleviates stress for both and is particularly effective with the extroverted sales professional.
- Walk a mile in their shoes. Ask if you can attend sales meetings; sit in on presentation practices and strategy sessions.
- Offer reassurance. They are looking to you, even if they don't always articulate that.
- Look for places where you can be flexible, such as embracing phone conversations; draw the line in the sand in areas where you cannot, such as moving deadlines.

- Use positive reinforcement. All professionals want to hear that they have done a good job and to feel recognized for their hard work.
- Practice gratitude. Say “thank you” often. Manners go a long way in fostering great relationships.
- When there is a conflict, focus on your common desire to put together a great proposal, on time, and win the business.
- Continue to grow your proposal skills and your professional identity. Connect with others in APMP to learn how they approach these relationships.

Once you embrace your differences and find the ways that work best for you and your sales team, even on the hardest days, you won't be sorry you said “I do” to being a commercial proposal professional. ●

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**Christine Gordon, CF APMP**, is the proposal coordinator and staff writer for Marsh & McLennan Agency's Western region. She holds a master's degree in counseling and applies those skills to her work in proposal management. She can be reached at + [christine.gordon@bameyandbarney.com](mailto:christine.gordon@bameyandbarney.com).

Federal



# Effective Federal Proposal Directives: Your Proposal Work Plan AND Golden Ticket

By Danielle O'Grady, CF APMP

## THE PROPOSAL DIRECTIVE TAMES THE ANIMAL

Federal proposals are their own animal. They are typically large and complex, and they contain a slew of requirements compared to commercial proposals. This animal must be tackled head-on — with a well-planned, comprehensive federal proposal directive. The proposal directive (aka proposal plan, proposal management plan) summarizes the requirements of an RFP, and preparing a truly effective directive is an art. The directive is not just an administrative document; it's a proposal manager's work plan — and the golden ticket to keeping it all organized.

## YOUR CORPORATE PROPOSAL DIRECTIVE TEMPLATE

Take the time to develop a corporate proposal directive template to be used consistently among all proposal managers in your company. The beauty of the directive

template is that it can be tailored for all sorts of federal proposals, from smaller task orders (5 pages) to large complex IDIQs (indefinite delivery/indefinite quantity, 25 pages). Collaborate with your proposal managers. Incorporate best

practices and ideas to make the most valuable template for your firm. Remember, the template is a living document—update it continuously to capture best practices and lessons learned along the way.

## EFFECTIVE AND COMPREHENSIVE FEDERAL PROPOSAL DIRECTIVES FOR SPECIFIC RFPs

Being a federal proposal manager is very similar to being a project manager. You have to abide by a scope, a schedule, a set of requirements, and a standard of quality and compliance. It's nearly impossible to keep everything straight in your head, and you shouldn't have to. The directive takes

care of “remembering” everything for you—and it does it in one document.

You may have seen federal proposal managers use multiple documents to plan and manage proposals. There might be one document containing the outline, assignments, and deadlines; another document with the overall schedule; and yet another document with highlights to address at the proposal kick-off meeting. However, a thorough proposal directive can capture all of these management tools in one concise file.

The RFP-specific federal proposal directive is a living document. It is continuously updated to reflect the progress of the proposal and any changes from amendments. At any given time, the directive gives a current snapshot of everything going on with that proposal.

An effective proposal directive encompasses every element of an RFP and includes the contract information, scope of work, SWOT/competitor analysis, win themes/discriminators, team members, calendar and milestones, compliance/response matrix, proposal outline and assignments, deconstructed RFP requirements and evaluation criteria, project candidates, personnel candidates, production requirements, and a proposal management checklist. A well-crafted proposal

directive also accomplishes three important goals by:

- Delineating every facet of the federal proposal in one comprehensive document.
- Making color-team reviews easier and more effective by having all the proposal information (e.g., scope, instructions, evaluation criteria, compliance elements) in one place, rather than having reviewers reference several RFP documents.
- Providing the complete picture of the proposal, in case another proposal manager needs to take it over or if final production is taking place in a different location.

The directive also serves as a valuable tool for conducting effective proposal kick-off meetings and status meetings throughout the process, because the most productive meetings will follow the flow of a well-prepared, comprehensive proposal directive. The directive should be structured in such a way that it follows a logical sequence in planning the process, while enforcing compliance, responsiveness, and salesmanship.

#### **THIS IS YOUR WORK PLAN**

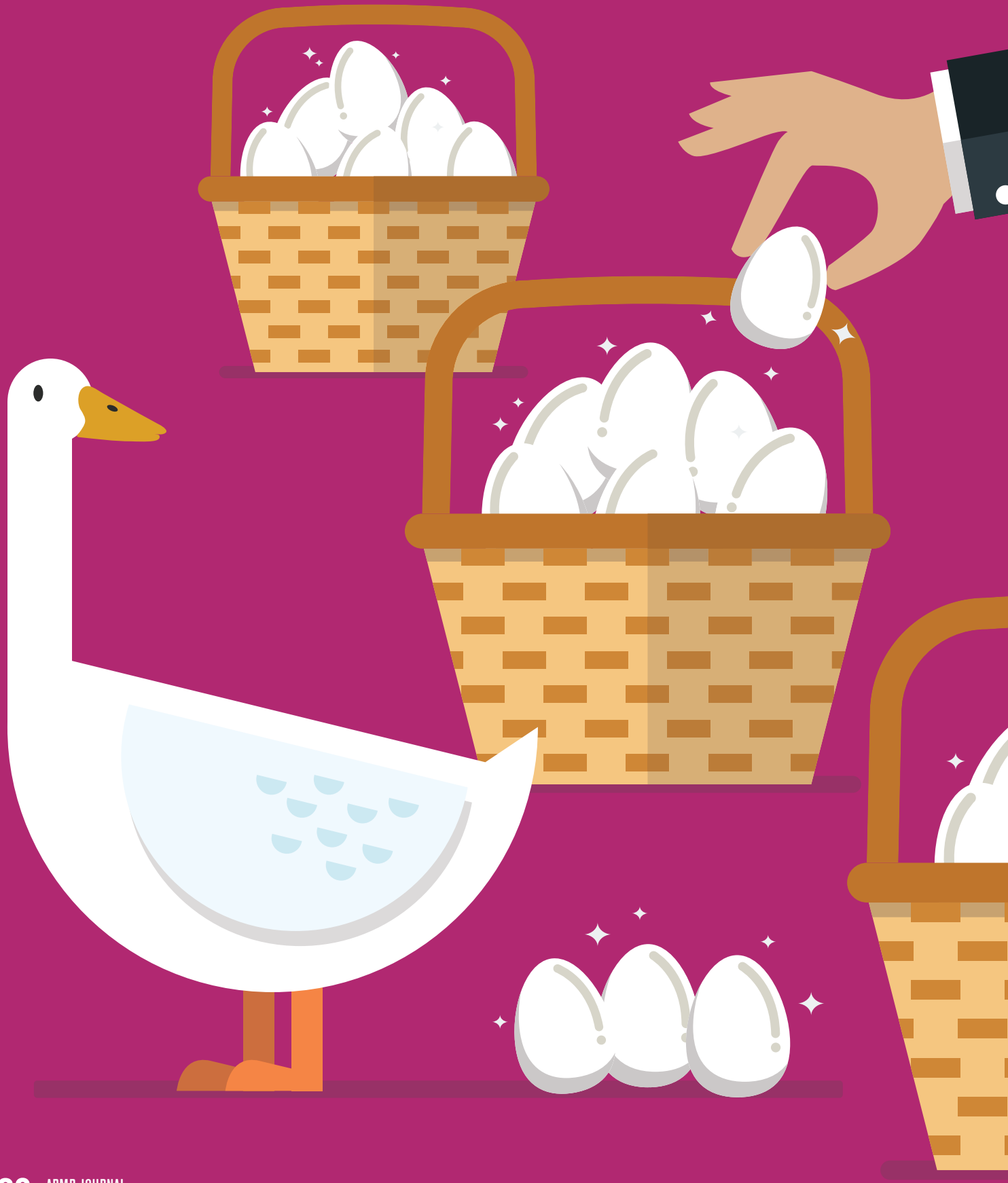
Make the directive work for you and your proposal team. Include

compelling and relevant highlights of your team members (subcontractors and partners); client quotes, commendations, and awards; a draft executive summary; a projects-to-personnel matrix; a projects-to-scope matrix; potential graphic ideas; and example tables and figures. These materials will be valuable to your authors, technical subject matter experts, pricing/estimating team, reviewers, coordinators, and support staff.

Don't look at preparing the proposal directive as an administrative task. When done properly and completely, the proposal directive serves as a complete work plan for your project. It's important that you don't rush in its preparation. If you take your time with it at the beginning of the process and make sure every nitty gritty (sometimes ridiculous) nuance is included, you will have a “golden ticket” to reference throughout the process. Willy Wonka gave out only five golden tickets. You have the power to artfully create yours every time! ●

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# A CASE FOR DIVERSIFICATION IN PROPOSAL CONSULTING

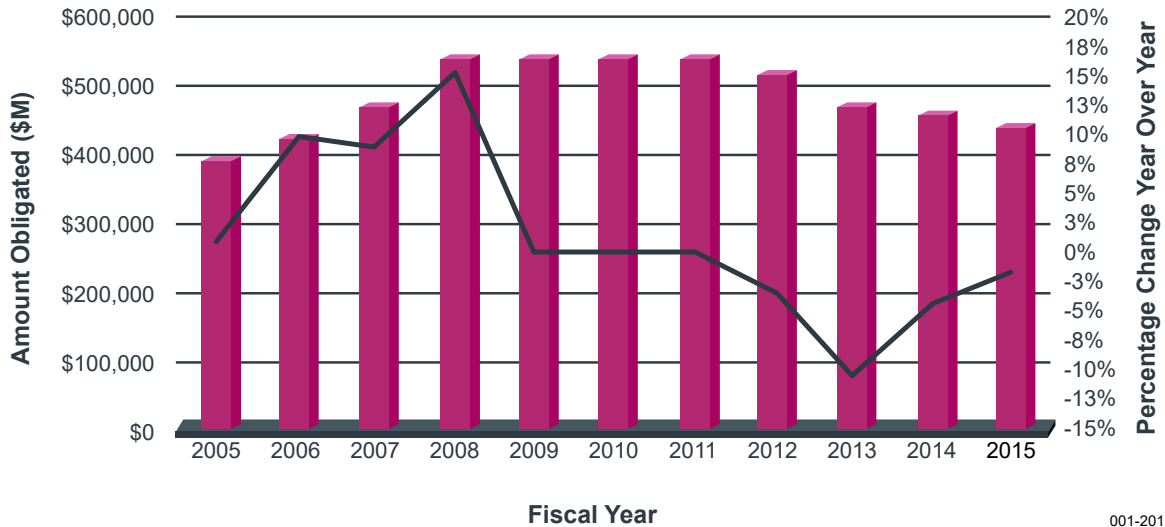
## WHY TRANSITIONING FROM GOVERNMENT TO COMMERCIAL IS SMART

*By Amber Hart*

In 2013, most government contractors were feeling the pain of on-again, off-again funding borne out of congressional gridlock—even before the approximately \$80 billion cut on March 1.<sup>1</sup> After March 1, 2013, 61 percent of government contractors were significantly or moderately affected by sequestration and the shutdown.<sup>2</sup>

1. Jennifer Liberto. "Spending Cuts Are Hurting Economy." *CNN Money*, 18 Oct. 2013, [money.cnn.com/2013/10/18/news/economy/sequester-economy-shutdown/](http://money.cnn.com/2013/10/18/news/economy/sequester-economy-shutdown/).
2. William Welsh. "Government Contractors Feel Pain from Shutdown, Sequestration." *InformationWeek*, 23 Dec. 2013, [informationweek.com/government/big-data-analytics/government-contractors-feel-pain-from-shutdown-sequestration/d/d-id/1113248](http://informationweek.com/government/big-data-analytics/government-contractors-feel-pain-from-shutdown-sequestration/d/d-id/1113248).

## Federal Reported Spending Trends Fiscal Years 2005-2015



001-2017

Source: National Contract Management Association (NCMA).

For those in the government contracting industry, sequestration may have introduced these panic-inducing thoughts: “What happens if this company has no use for my services or can no longer afford to pay my salary? How can my professional experiences translate into any other market?” And so the search for parallels between government proposals and the rest of the world began ... just in case.

### BUSINESS-TO-GOVERNMENT INDUSTRY LANDSCAPE

Fiscal year 2013 is only one of numerous examples proving the federal budget process is broken.<sup>3</sup> The current administration recently proposed an increase of \$54 billion in defense spending while taking an equal decrease in all non-defense discretionary spending. This would leave the Department of Defense and entitlement programs as the only funded and functioning entities in the government.

If you were a government contractor in 2013 and have yet to diversify into the commercial sector, you were not paying close enough attention. Political pressure to reduce government spending will continue to challenge government contractors, causing a trickle-down effect to resources within organizations.

3. National Contract Management Association. *Annual Review of Government Contracting, 2016*, [ncmahq.org/docs/default-source/default-document-library/pdfs/exec16---book---annual-review-of-government-contracting\\_lowres](http://ncmahq.org/docs/default-source/default-document-library/pdfs/exec16---book---annual-review-of-government-contracting_lowres).

Government proposal consultants are critical in helping government contracting organizations sustain their revenue. These consultants can be responsible for anything from responding to a simple request for information to serving as a solution architect for a multimillion-dollar request for proposal. However, government proposal consultants can work only if there is an RFP on the street. They are constantly caught in the middle of varying acquisition trends, more similar to an Agile sprint cycle than a consistent state of work.

These industry factors affect the livelihood of government proposal consultants:

- An increase in opportunities being “pushed right” or canceled in their entirety (even after being awarded).
- Gaining traction of the multiple-award trend.
- A rise in proposal protests.
- A state of ever-revolving doors of new budgets, priorities, regulations, and administrations.

With these factors in mind, government proposal consultants should start developing some risk mitigation strategies to ensure that companies always have use for their services. It would behoove them to think creatively and leverage their expertise in adjacent markets.

### DIVERSIFICATION INTO THE COMMERCIAL MARKET

The government proposal consultants’ skill set can translate and expand into the evolving and dynamic commercial industry, including the business-to-business and business-to-consumer markets. It’s easy to make a case for differen-



## EXAMPLES OF TYPES OF PROPOSALS

BUSINESS PROPOSALS	TECHNICAL PROPOSALS	PROJECT PROPOSALS	SALES PROPOSALS
CONSTRUCTION PROPOSALS	TRAINING PROPOSALS	DEVELOPMENT PROPOSALS	EXHIBITION PROPOSALS
IDEA PROPOSALS	DESIGN PROPOSALS	SPONSORSHIP PROPOSALS	GRANT PROPOSALS

tiating your client base. An average Standard & Poor's 500 index company earns about an 8.5 percent profit margin<sup>4</sup>, while most average government contractors work on about a 5 percent profit margin.<sup>5</sup> To put it simply, higher profit means a greater ability to outsource expertise—and the commercial industry has the money and the need.

Comparing public and private procurement, as well as the B2G, B2B, and B2C markets, is not entirely fair as they vary in processes and procedures. There are differences in budgets, management, and the RFPs. However, all three acronyms can be replaced with just one: human-to-human, or H2H. Government proposal consultants are the best to face H2H selling processes head-on, because they are already practiced in the most difficult H2H selling process there is—the one with the most red tape.

The challenge in marketing and selling H2H is finding, understanding, and explaining the complex in its most simplistic form. Government proposal consultants are experts in ensuring a response is written directly to address the thoughts, needs, and concerns of various stakeholders, while also being mindful of compliance requirements and strict directions. These two factors are just as important in B2B and B2C selling. With the distorted lines in today's globalized economy, government proposal consultants are able to assist, augment, and optimize any sales department by offering a creative and problem-solving mindset, coupled

## GOVERNMENT PROPOSAL CONSULTANTS ARE CRITICAL IN HELPING GOVERNMENT CONTRACTING ORGANIZATIONS SUSTAIN THEIR REVENUE.

with the ability to bring structure and procedures to a chaotic environment.

It is worth the legwork for government proposal consultants to step outside of their comfort zone, rather than pursuing only organizations that are strictly in the government contracting game—and the H2H industry will benefit. Booming commercial, public sector, and B2B markets include legal, banking/finance, insurance, lottery/gaming, staffing, health care, food service, consumer products, construction management, and architect-engineering. Within these markets, there is a whole world outside of the technical, management, and past performance volumes.

If you break down the similarities and differences between the B2C, B2B, and B2G markets, you will notice that the B2C and B2B markets have increased discretionary purchases. This fluidity of discretionary purchases would allow for government proposal consultants to supplement their pipeline of job opportunities when the B2G market is holding.

Government proposal consultants are able to easily adapt to and augment H2H sales offices because each transaction takes time and thorough consideration, and the outcome depends on decision makers similar to Source Selection Committees. For instance, B2B selling

4. Edward Yardeni & Joe Abbott. *Stock Market Briefing: S&P 500 Sectors & Industries Profit Margins*, Yardeni Research, 2017, [yardeni.com/pub/sp500margin.pdf](http://yardeni.com/pub/sp500margin.pdf).

5. Grant Thornton. *2015 Government Contractor Survey*, [grantthornton.com/~media/content-page-files/public-sector/pdfs/surveys/2015/Gov-Contractor-Survey.ashx](http://grantthornton.com/~media/content-page-files/public-sector/pdfs/surveys/2015/Gov-Contractor-Survey.ashx).



requires strategic planning, and it is driven by a complex, formal purchase decision-making process similar to the B2G acquisition cycle. Most businesses' formal purchasing process includes procedures for requests, approvals, procurement, and payment. *Is this sounding familiar yet?*

#### HOW GOVERNMENT PROPOSAL SKILLS TRANSLATE

Government proposal consultants can add value by providing focused sales enablement. They can effectively support the sales funnel, a critical function in H2H selling, in developing content, stories, and messaging. They can help a sales department be more responsive while participating in the part of the proposals that is often discouraged in the red tape world—being creative and strategic.

Here are some ideas on how government proposal consultants can support the three main cycles of the H2H procurement process: the requirements and pre-award; the post-RFP process; and the award and post-award process.

#### Requirements and Pre-Award

##### **Conduct and Respond to Market Research:**

Government proposal consultants have the ability to analyze, break down, and respond to these requests at the rapid rate that is required in the commercial world. They

can respond within the set parameters while beating the clock and making a compelling argument for the client.

**Create the Request for Proposal:** Nineteen percent of a sales professional's day is spent on administrative tasks—that's almost 50 days a year.<sup>6</sup> Those tasks include the creation of RFPs. While the creation of an RFP and the resulting implementation can be time-consuming and taxing on internal staff, when it's done well, a company can reap the benefits. Government proposal consultants can help a sales department develop a thorough and strategically designed RFP, providing the company insight from a subject matter expert and allowing the sales professionals to get back to doing what they love—selling.

##### **Support Strategy Sessions and Competitive**

**Black Hats:** In all H2H selling, there are several stakeholders in the purchasing process, including those that influence, recommend, and have authority to order a purchase. In B2G, B2B, and B2C markets, it is critical that offerors fully understand the needs of the organization to

6. Fergal Glynn. "The State of Sales Productivity in 2015." *Salesforce*, 13 Jan. 2015, [salesforce.com/blog/2015/01/state-sales-productivity-infographic-gp.html](https://salesforce.com/blog/2015/01/state-sales-productivity-infographic-gp.html).

which they are selling, as well as the organization's buying processes and stakeholders. A comprehensive strategy session in the commercial market can be compared to the critical nature of a B2G Black Hat, PWin session, and gate review when pursuing a tactical opportunity. Government proposal consultants are experienced in not only running these sessions but also actively participating, to confirm understanding and identify gaps in order to ensure the foundation of a strategic pursuit. Studies have proven that better profit outcomes were achieved when bid planning started up to six months before an RFP was released; so consultants should market their ability to help organizations not only formally qualify an opportunity but also create a higher win probability.

### Post-RFP Process

**Respond to the RFP:** In his 1999 publication *Strategic Proposals: Closing the Big Deal*, Robert Kantin identifies the critical linkages between counseling, selling, and writing a proposal that communicates value to a buyer. In his book, he references various examples of failures of the seller-driven sales proposal:

- Does not identify the buyer's situation or grasp the buyer's needs and objectives.
- Makes only sweeping money-making or -saving statements.
- Does not provide details on production, implementation, installation, etc.
- Does not openly identify roles and responsibilities of both the buyer and the seller.
- Forces the buyer to guesstimate total fees.

*Again, sound familiar?* Even though Kantin published his observations 18 years ago, these problems still ring true today. At the highest point of stress, the final connecting place and the culmination of all the marketing and sales joint efforts, one would assume the proposal would be the most systematic, well-refined, and efficient piece of the whole process. However, in most companies, the process is extremely clunky and undefined—and the typical sales proposal must go through four people to be fully developed and approved.<sup>7</sup>

In the B2G world, when the only way you get new business is by responding to RFPs, it's easier to accept that you must invest in your sales department if you want to win. For a government contractor, the relationship with the customer is often second (unfortunately) to the regulated process in determining who will win. You can have an excellent client relationship and lose because you weren't compliant.

In the B2B and B2C markets, the relationship is often more important than the proposal. Because of the time, effort, and administrative costs required, many sales professionals do not focus on creating a quality error-free proposal. In fact, only 47 percent of best-in-class sales organizations have processes to streamline proposal quotes and contract workflows.<sup>8</sup> As many organizations have learned, if you don't put enough emphasis on your proposal, you have a weakness in your closing process. And that's not where you want to be weak. Government proposal consultants can empower a sales organization to not only respond compliantly and rapidly to a commercial RFP but also create the powerful content needed to convey the value that an offeror brings to the buyer.

### Assist in Oral Training or Oral Presentation:

The government's use of oral presentations as part of the proposal process rises and falls depending on the current philosophy, but their use in the commercial world is an everyday occurrence. Government proposal consultants skilled in oral presentations are able to objectively train professionals that it is not about how you look or speak—it is about meeting the intangible objectives of the buyer.

### Award and Post-Award Process

**Evaluate the Submitted Bids:** Today's competitive demands require that the procurement process be accomplished in a capable, unbiased, and professional manner. A purchase can stand or fall on the expertise and performance of a purchasing manager or buyer who is striving to obtain a good or service at the best overall value. Although it isn't explicitly applicable in commercial procurement, government proposal consultants' vast knowledge of the Federal Acquisition Regulation can offer an experienced, compliant, and objective viewpoint, to make an unbiased evaluation of submitted bids.

Government proposal consultants are crucial to helping a government contracting organization maintain its revenue. But factors such as the multiple-award trend, proposal protests, and the ever-revolving doors of new budgets, priorities, and regulations will affect their livelihood unless they think outside the box and diversify into the commercial market. ●

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7. Smith, J. (2016, March). *Best Practices in Bid Management: A Cross-Industry Global Survey*. Retrieved from [http://www.jnsbusinessdevelopment.com.au/global\\_best\\_practices\\_in\\_bid\\_management.pdf](http://www.jnsbusinessdevelopment.com.au/global_best_practices_in_bid_management.pdf).

8. A. Moravick. *The B2B Business / Customer Arc: Crafting Keystones from Marketing & Sales*, May 2016, [v1.aberdeen.com/launch/report/research\\_report/12508-RR-Business-Customer-Arc.asp](http://v1.aberdeen.com/launch/report/research_report/12508-RR-Business-Customer-Arc.asp).

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# SOLUTION DEVELOPMENT

IN INTERNATIONAL B2B PROPOSALS



## PUTTING TOGETHER A VALUABLE B2B PROCESS

*By Dr. Robert S. Frey*

**D**ifferences mean professional possibilities. Cultural differences, native language differences, and time zone differences are all parts of international proposal development. Working with culturally diverse technical subject matter experts across the world presents meaningful opportunities (and challenges) for proposal professionals. How? They must help translate domain-specific, quantitatively focused solutions into a hard-hitting business case.

Unlike U.S. federal government competitive procurements, commercial business-to-business proposals can involve several face-to-face interactions with the customer's management and technical teams subsequent to the release of the final solicitation documents. This presents multiple opportunities to successively enhance and tune the management and technical solution sets. Given the 24/7 work cycle and customer expectations for rapid modifications and iterations, the velocity of this process makes the international commercial proposal development environment particularly invigorating. It also becomes quite demanding from perspectives such as communication and document configuration control.



To be sure, there are considerable similarities between commercial B2B solicitations and U.S. federal competitive RFPs. In a recent \$100 million commercial request for solution, for instance, there were numbered sections that addressed format, page count, and file-naming conventions—similar to Section L of the Uniform Contract Format of the Federal Acquisition Regulation. In addition, there were evaluation criteria and considerations nearly identical to Section M. There was also discussion of *quality, capability, cost management, approach, and value to be delivered*—clearly recognizable language from the federal market space. Of note in the commercial RFS was special focus on “ensuring that the relationship and operational interaction with [the client] will be well managed.” Clearly, the long-term interaction between offeror and ultimate client was envisioned by that client to extend far beyond a transactional level.

Data analytics, Agile data stores, Lean principles, Centers of Excellence, and robotics were important elements in the technical solution set for this particular commercial proposal. However, the pivotal decision makers of the ultimate client—a multibillion-dollar, European-based corporation with a global presence—directed laser-like attention toward the business side of the equation. They zeroed in on the business value to be delivered by the talented people, advanced processes, deep knowledge, and leading-edge tools presented in the offeror’s proposal. Indeed, there was an entire series of pre- and post-RFS-release meetings that focused almost exclusively on the business case and the sustainability of the potential long-term partnership.

Therefore, technical details—which certainly needed to be presented and illustrated—had to be transformed into business benefits. These encompassed compressed “time-to-value” horizons, decreased total cost of ownership, increased corporate-level visibility into the program, relevant “value levers” and when to activate them, and lower risk profiles, as well as support for triple bottom line, or TBL, business practices. TBL addresses the social contributions, environmental sustainability, and financial dimensions of a corporation. And the proposal had to demonstrate how the ultimate client would move up the “value chain” within its particular industry, based upon the solutions being offered. Conceptualized by Dr. Michael E. Porter of the Harvard Business School, *value chain* refers to changing business inputs into business outputs such that

they have greater value than the original cost of creating those outputs.

One mechanism that can be used to show that a team has carefully considered multiple hypotheses and “what-if” scenarios is a table with

### Decision Variables → Options → Implications

as the three column headings. This can be a powerful tool for demonstrating understanding of the ultimate client’s business environment, both today and in the future. This technique can be applied in U.S. government proposals, too.

Among the valuable lessons learned:

- Appoint two document “owners” for each proposal module—one in the U.S. and the other in India or South Africa, for example, to cover the entire 24-hour cycle in a given day. These document owners will be fully accountable for configuration (version) control.
- Introduce all core team members early in the proposal life cycle, to facilitate full understanding of roles and decision-making authority, swim lanes, plan of action, and milestones.
- Conduct regular “stand-up” teleconferences to communicate progress, priorities, critical near-term issues, and the geographic location of core team members so everyone knows in which time zones they are working. *Over-communication is critical to success within distributed teams.*
- Develop the end-to-end proposal outline early in the process, and continually validate it against the solicitation document and client verbal directions, as they evolve over time, to ensure exacting and full compliance. ●

**Dr. Robert S. Frey, APMP Fellow, PMP®**, is co-owner and principal at Successful Proposal Strategies LLC. His book *Successful Proposal Strategies for Small Businesses* (Boston: Artech House) reflects insights, lessons learned, and best practices from his 30 years of professional proposal development. He can be reached at 410-812-1177 or [+rfrey@proposal2.com](mailto:rfrey@proposal2.com).



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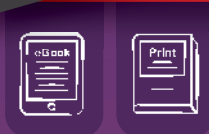
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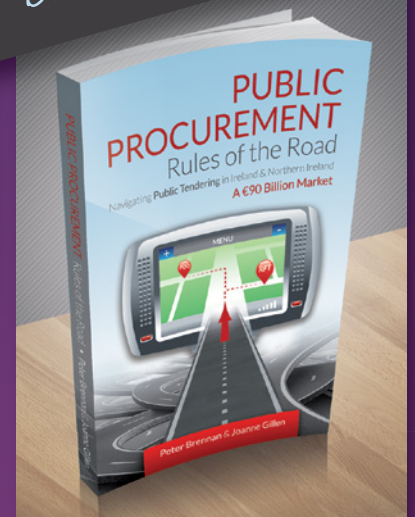
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# BOOK REVIEW

## *Proposal Essentials: Win More, Win More Easily*

BY JON WILLIAMS AND BJ LOWNIE

Review by William B. Boggs Jr., MBA, PMP, CPP APMP

**PROPOSAL ESSENTIALS** is a must-read for those with limited proposal experience; it also serves as an excellent refresher for experienced proposal professionals. The topics cover the complete proposal life cycle—bid qualification, pre-proposal planning, proposal project management, proposal strategy, content design and development, document management, reviews and approvals, orals, and learning reviews.

The authors provide a common-sense approach to proposals in an effort to make proposal life less stressful, including valuable checklists and tables. One point made in the book is the need to treat the proposal development activity as a program or project: The proposal activity should be planned, staffed, executed, and measured like a program. Planning and leadership are essential to avoiding the “late night and cold pizza culture” many experience on challenging proposals.

A key part of a proposal strategy is to tell a compelling story that is tailored to customers’ needs. Williams and Lownie provide a transformation map to show how solutions or services will take customers from their current state to their desired future state. The transformation map helps focus thoughts and ideas on the customers’ current and future states and captures activities to enable the transformation, while avoiding risks. The transformation map is in and of itself worth the price of the book and is a tool to add to every proposal toolbox.

“Why us, why not the competition?” The authors emphasize the need to answer this question and to be



“ruthless” in the qualification of the bid. The authors promote answering the following questions in investigating the opportunity:

- Is it real?
- Is it really wanted?
- Can it be won?
- Can it be executed?
- Is chasing the opportunity a key decision?

The best way to improve a win rate is to not chase phantom or wired opportunities.

*Proposal Essentials* delivers 20 tips to improve proposal writing and content development, including customer-centric content, the left-hand rule, and active subheadings. If a lessons-learned review is needed, there is a detailed agenda outline included to run the meeting. The book’s numerous tips and recommendations help to eliminate the drama often associated with after-action reviews.

Williams and Lownie have written a simple, easy-to-read book with powerful recommendations, based on decades of experience, that earns its space on your reference bookshelf. ●

**William B. Boggs Jr., MBA, PMP, CPP APMP**, has more than 32 years of engineering leadership and new business/capture experience. He can be reached at + [bboggs@knology.net](mailto:bboggs@knology.net) and on Twitter @BillBoggs.



# IMPRESSIONS

## *Writing Business Bids and Proposals for Dummies* Is APMP's No. 1 Selling Book

By Christina Lewellen

**APMP'S FIRST BOOK** for commercial bookstores, *Writing Business Bids and Proposals for Dummies*, has zoomed to the top of the APMP best-seller list and has impressed Wiley Publications, the book's publisher.

Despite a crowded business-book market, APMP's book sold out of its first printing seven months ahead of schedule. Once the books in stores all over the world have sold, the book will immediately go into its second printing.

This is the first book of its kind written to pass on the collected knowledge and skills of professional proposal writers. The 404-page book is the ultimate reference guide, or refresher, for proposal writers—to guide them step by step on how to think, organize their thoughts, and write, edit, and deliver a proposal that gives them the best chance of winning, using APMP's best practices.

As of the start of 2017, *Writing Business Bids and Proposals for Dummies* reached the following milestones and shattered all previous APMP publication sales records in just under five months:

- Sold 1,130 books (1,038 to APMP members and 92 to nonmembers) and eclipsed publisher goals seven months early.
- 76 percent of sales were in the United States.
- 24 percent of sales were in the UK and other international markets.
- 315 books (28 percent) were sold in December 2016.

"We are humbled by the way the industry embraced this book globally," said Rick Harris, executive director of APMP. "The reason it flew off our bookshelves is because

it is a true 'how-to' book and gets the reader started on his or her proposal," he said.

Harris added that APMP expects to see greater sales in the coming months in non-U.S. markets, due to targeted advertising and promotions and a better infrastructure in place to service international sales. Wiley Publications told APMP that the book was one of the big surprises of the year, consistently outselling much more established business book titles.

The book is broken down into six parts: Understanding Proposal Development, Focusing on Your Customer, Planning Your Approach, Creating Your Proposal, Taking Your Proposal to the Next Level, and the highly informative and philosophical Part of Tens. Readers get 16 chapters of information, jam-packed with hundreds of tips, warnings, and proposal reminders.

*Writing Business Bids and Proposals for Dummies* was written by Neil Cobb and Charlie Divine, two APMP Fellows. Cobb and Divine have a combined 50+ years of proposal writing and management experience and have been on the front lines of proposal writing globally.

For more information or to buy APMP's fastest selling publication, go to [APMP.org/?page=publications](http://APMP.org/?page=publications). ●

