journal

VOLUME IV NUMBER I // 2016

APMP

Your Professional Guide to Winning Business

+

- THE OTHER ROI
- MANAGING TEAMMATE DATA CALLS
- IRREFUTABLE EVIDENCE
- PUTTING YOUR BEST FACE FORWARD
- CUTTING THROUGH THE RED TAPE

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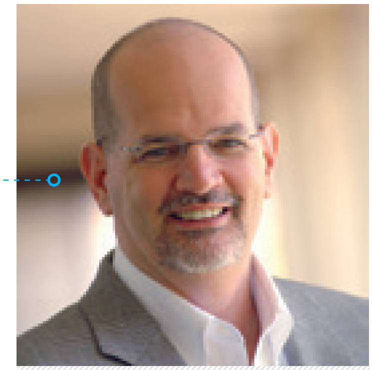
FROM APMP'S
EXECUTIVE
DIRECTOR



THE CONTINUED NEED FOR A GROWING APMP MEMBERSHIP

APMP's membership has experienced phenomenal growth over the last five years. In 2015, we had our best year in the association's 28-year history, with 1,182 new members coming into our community. Since 2011, APMP's membership has increased 70 percent—from 3,383 to more than 7,100 industry professionals worldwide.

While most everyone in our association is pleased with the expansion of APMP's membership base and footprint globally, one question I am frequently asked is "Why do we focus on member growth?"

It's a fair question. Before providing any of the several answers, I, in turn, ask those individuals why they think we relentlessly pursue new members. I've heard everything from "APMP wants more money" to "APMP wants to hire more people." I can tell you that is not why we are growing. The real reasons APMP pursues new members to join our industry include:

- **More members mean more connections for you.** Every association professional is driven by this creed. We look for more members so all of you have an opportunity to exchange more ideas, to network, and to learn from each other in greater numbers. It's what drives APMP staff, and it's why associations exist.
- **APMP planned for this growth.** APMP's board of directors and staff planned for this growth through two long-range planning meetings. We met in 2011 and again in 2014 to create three-year plans. We've been sticking to those plans faithfully, and they have contributed to our growth.
- **We have the industry's first, best, and only certification program.** This is our No. 1 driver for new membership. Whether you want APMP certification to land a job, to demonstrate your industry knowledge and skills in your own organization, to earn a higher salary, or for your personal professional development, certification drives APMP membership.
- **We are building an industry.** With every new member, we are proving that all people in all parts of the proposal development and business development life cycles are part of a professional industry. We can make that case more effectively when we have more than 7,000 members—with our sights set on 10,000 members.

These are exciting times for APMP and its members. We are growing in the United States, throughout Europe, and now in the Far East with our Japan and Korea Chapters. The beating heart of this growth is our desire to connect people from all over the globe and to be able to share information about what they do. We love to hear new members tell us they didn't know there were other people out there who do what they do, and it's nice to be able to have a professional family.

In the coming years, APMP will increase its focus more on vertical markets, such as financial institutions, real estate companies, marketing firms, and others realms that include people who produce proposals every day but might not know there is an art and science to winning.

We will continually review our APMP membership benefits and how our APMP chapters add local value to our membership efforts. In short, membership recruitment and retention will always be on APMP's front burner because it matters to us that you are a part of a global association and have more resources than you could have ever imagined for only $150 a year.

If you ever want to know more about APMP's membership efforts, don't hesitate to reach out to me via email or at 202-646-7075.

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

Best informed wins...

Experts...

- Capture managers
- Proposal managers and coordinators
- Volume leads
- Solution architects/SMEs
- Proposal writers and editors
- Graphic design artists
- 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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FROM APMP'S

CEO

SECURING APMP'S POSITION AS THE LEADING GLOBAL ASSOCIATION FOR BID AND PROPOSAL MANAGEMENT PROFESSIONALS AND THE WORLDWIDE AUTHORITY ON WINNING BUSINESS

Gaining recognition and credibility within a profession, business, and government is a slow and on-going process, but one I am pleased to say that APMP is continuing to embrace and advance at an ever increasing pace. With key metrics for measurement being the size of our membership base, participation in the Certification program, external recognition, and event attendance, our past success is self-evident through our achievements, some of which include:

- Over 70 percent growth in membership over the past five years.
- Recognition as the leading professional body by both state and commercial organizations.
- Record number of Certifications in 2015.
- An ever increasing number of events with greater member and nonmember participation at both chapter and international levels.

EVOLUTIONARY CHANGE AND OUR NEED TO ADAPT

At APMP's Long Range Planning workshop in 2014, your then Board of Directors identified a changing member demographic across geographic distribution, gender, industry representation, and member profile. This flagged the need for reorganization, both to continue delivering the services we have come to expect and extend these to our key areas of growth. Some programs that we have underway to address this change include:

- Operational Reorganization – contractors, staff, and processes.
- Increased focus on the capture community – exploring a capture Certification program.
- Translation of our assets into other languages – translation of the Body of Knowledge and Foundation Examination into Japanese.
- Embracing the nonspecialist proposal market – publishing a *Proposal for Dummies* book with Wiley Publications.

SOME CHAPTER HIGHLIGHTS FROM ACROSS THE ASSOCIATION

Netherlands celebrated its 10-year anniversary with a full-day seminar and dinner.

Carolinas sponsored four all-expenses paid scholarships to the regional conference, the Southern Proposal Accents Conference (SPAC).

Ireland is celebrating over 100 percent member growth.

Korea published its first-ever Korean *Proposal Journal*.

National Capital Area's 2016 Mentor-Protégé Program has 17 active pairs and 100 percent submission of Q.1 plans. It awarded five scholarships to aspiring professionals for attendance to the APMP Bid and Proposal Conference.

South Africa developed and launched a local Corporate Member package to address the declining value of local currency.

Georgia Chattahoochee is celebrating 19 years of leading the collaborative effort in planning SPAC.

Greater Midwest hosted its third Chapter Symposium.

UK developed the first nationally recognized Bid and Proposal Apprenticeship standard with U.K. Government Apprenticeship Board approval, and hosted more than 20 Chapter events over the past 12 months.

India received professional recognition of its APMP Certification Program by top corporations.

Japan had a kick-off meeting that attracted more than 70 supporters, half of which have now become APMP members with 30 potentials awaiting Certification.

Mid-South jointly sponsored an Annual Mentor Night for young professionals together with PMI, NCMA, and AFCEA.

Chesapeake hosted its APMP Foundation Training with a 100 percent pass rate.

Australia/New Zealand (ANZ) held the first-ever conference in Melbourne with sell-out delegate attendance in March 2016.

Maple Leaf event networking has helped a member find employment.

Lone Star Chapter successfully merged with the Dallas/Ft. Worth and Houston Chapters.

I anticipate an exciting year ahead as we continue to offer new APMP Member Benefits and strive to maintain an annual 10-plus percent membership growth.

Don't forget to book for APMP's Bid & Proposal Con 2016 in Boston for which to date, has recorded record registrations. I look forward to meeting and speaking with my fellow Bid and Proposal Management Professionals at this premier event.

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

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ASSOCIATION NEWS

GET READY FOR APMP BID & PROPOSAL CON 2016

The 27th annual APMP Bid & Proposal Con is quickly approaching! APMP is thrilled to welcome attendees to the Sheraton Boston Hotel for this year's event. Here is a brief schedule of events to make sure you plan to attend all the must-see sessions.

WEDNESDAY, MAY 25

Noon–5 p.m.	Registration
12:30–4:30 p.m.	Certification Workshops
6–7 p.m.	First-Time Attendees Workshop
7–9 p.m.	Welcome Reception

THURSDAY, MAY 26

7 a.m.–5 p.m.	Registration
7–10 a.m.	Breakfast, Opening Session and Keynote, and Networking
10 a.m.–4:50 p.m.	Presentations
7–10 p.m.	APMP Celebration of the Industry Awards Dinner

FRIDAY, MAY 27

7 a.m.–4 p.m.	Registration
7–10 a.m.	Breakfast, Welcome, and Networking
9:30–11 a.m.	APMP Situation Room
10 a.m.–4:50 p.m.	Presentations
5–7 p.m.	APMP Fellows Reception (invite only)

SATURDAY, MAY 28

7 a.m.–12:30 p.m.	Registration
7–9:30 a.m.	Breakfast, Welcome, and Morning General Session
9:40–11:50 a.m.	Presentations

Presentations cover a variety of relevant industry topics, including professional development, capture and business development, software, graphics and technology, and federal and commercial proposal management.

There is still time to register as an attendee! Visit *APMP.org* to finalize the registration process. ●

CHECK OUT APMP FOUNDATION CERTIFICATION PROGRAM UPDATES

The APMP Foundation certification program was recently updated to create a more universal language that reflects the diversity of the business development, proposal and bid management, and production and graphics professions.

The new APMP certification study materials are vendor neutral and research-based, and they present a true representation of industry standards and best practices.

Included in the updated certification program are three new certification competencies to reflect new and emerging trends:

- Persuasive Writing
- Graphics and Action Captions
- Virtual Team Management

The new exam, which has fully replaced the previous version, is available at *apmg-exams.com*.

Professionals who are preparing for the new exam should rely on the APMP Foundation Study Guide (BOK Edition), which is available in the APMP Store, along with the APMP Industry Glossary of Terms. The glossary provides significant guidance to the exam's updated terminology.

If you have any questions about the certification program updates, contact Charlie Divine, director of certification, at + *charlie.divine@APMP.org*. ●

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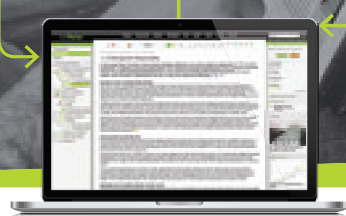

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C

TEAM EFFORT

The Other ROI

GIVE YOUR TEAM A RETURN ON INFORMATION

By Anthony (Tony) C. Constable

WOULD ANYONE WANT to live in a society where the police have no method to record and share what they learn about crime rates and criminals? Of course not. The expectation is that police provide a positive return on their information investment.

Neither would proposal professionals want to work for an organization that allows information to be discovered, used, and then forgotten—rarely recorded, shared, and reused by its knowledge workers. Who would? However, most business development departments operate in precisely this manner. Part of the problem is that business development managers persist in seeing "the win" as the sole return on investment. Once a capture campaign is over—win, lose, or draw—the capture team disperses, and with it goes the information that supported the pursuit.

But does it have to be that way? Of course not. There are companies that have operated in what is called an "infocentric manner" ever since computers became affordable for small businesses. All nonproprietary information learned by the knowledge workers is immediately entered into the "infostructure," tagged to create metadata that allows it to be easily retrieved, and then made available to everyone in the firm. This eliminates the need to pay repeatedly to learn the same information; the internal information databases become the primary source when information is needed or questions arise.

When this system is established, it creates a culture that abhors so-called "dark data"—learned information that has not been captured, tagged, and prepositioned for possible reuse. Operating a knowledge-based business any other way would be unthinkable.

Information, if shared and cultivated as the bridge between and among pursuits, can be used to improve future teams, solutions, bid prices, and win rates while building an ever-improving, self-policing, and increasingly valuable corporate culture and asset.

Three elements are required to initiate this type of culture:

- Development of a supportive infostructure.
- Implementation of a training program to define, describe, and develop an infocentric culture.
- Continual feedback that rewards good "infocitizens" and identifies and reforms (or eliminates) bad actors.

Developing a supportive infostructure is the first step. Without the infostructure, accompanied by database seeding (contact lists, robust structures, graphical user interfaces, etc.), there won't be enough compelling value to establish potential infocentric knowledge workers as good infocitizens.

Training is an absolute necessity. Intellectually, most everyone understands why an organization would want its people to record and share potentially reusable information. Practically, however, many people view such activities as someone else's job. After all, it is a rare job description that requires employees to remember, record, and share what they are paid to learn. The training program must focus on promoting this process as part of a new culture that:

- Prioritizes the capture and tagging of learned or discovered information snowflakes.
- Allows those snowflakes to stand alone while creating metadata that allows them to be easily found.
- Broadcasts them to colleagues who may immediately benefit from them.

Continual feedback is essential, and so is helping all knowledge workers become good citizens in the infocentric environment. Peer-to-peer self-policing ensures veteran and novice citizens in the information democracy are making useful additions to existing information and correcting erroneous information.

INFORMATION, IF SHARED AND CULTIVATED AS THE BRIDGE BETWEEN AND AMONG PURSUITS, CAN BE USED TO IMPROVE FUTURE TEAMS, SOLUTIONS, BID PRICES, AND WIN RATES WHILE BUILDING AN EVER-IMPROVING, SELF-POLICING, AND INCREASINGLY VALUABLE CORPORATE CULTURE AND ASSET.

Not everyone is cut out to be infocentric. Beware of the inarticulate and those who believe the mission is to create an information landfill. Weed out the noncontributors and nonparticipants, especially those who see ownership of dark data as job security. And, as always, remember that busyness is not a proxy for productivity.

Any business development organization should want to invest in becoming smarter, more productive, and more successful. However, business development is only one part of the organization, and undervaluing information is most likely a corporatewide issue. Nothing can change without leadership buy-in, so the stubby pencil version of business development competitive intelligence continues on. ●

Anthony C. (Tony) Constable is a price-to-win (PTW) practitioner, educator, and author in government contracting circles. His book *Hope Is Not a Winning Strategy… But Price-to-Win Is* has become the de facto defining text that provides a how-to for PTW studies. Tony can be contacted at + *tconstable@caisisco.com.*

Glossary

infocentric: (adj.) focused on gathering and storing information in a way that makes it easily accessible to others
infostructure: (n.) a system that supports an infocentric business development process
infocitizen: (n.) a person who is dedicated to gathering and storing reusable information
information snowflake: (n.) stand-alone information that should be captured, tagged, and categorized in an infostructure for retrieval

BD

VERDICT

Irrefutable Evidence

FOUR SIMPLE STEPS TO MORE PERSUASIVE PROPOSALS

By Chris Sant

tip

1. When should you have ready-to-go evidence?
   - To address frequently encountered objections.
   - To prove the value of your differentiators.

If your company recently had a public scandal, you'll need evidence to counter any negative impressions.

2. Repetitive evidence has diminishing persuasive value. A good rule of thumb is that a second item of evidence that establishes the same concept has only 25 percent the value of the first. Beyond three examples of the same thing, there's little added value.

AT A MINIMUM, BASIC HUMAN SKEPTICISM LOPS 20 PERCENT OFF YOUR STATED VALUE – AND GOD HELP YOU IF YOU DIDN'T EVEN QUANTIFY THE VALUE OF YOUR SOLUTION.

IMAGINE YOU'VE JUST been named juror No. 5 for a business dispute trial, despite all your best efforts to get out of it.

Company A and Company Z are suing each other for $15 million. At the end, you'll have to decide which company receives the money. How will you make your decision? Flip a coin? Consult an astrologer?

Let's consider some possibilities.

If Company A presents evidence on each key issue you want to know about, and Company Z doesn't, who are you going to vote for?

If Company A presents evidence from accountants, managers, eyewitnesses, and third-party experts, and Company Z puts just one manager on the stand who repeats over and over how experienced the company is, who are you going to vote for?

If Company A's evidence is specific to the issues you want to know about, and Company Z's evidence is irrelevant and amounts to little more than "We're good people who have been in business a long time, so you should trust us," who are you going to vote for?

Your proposal readers are your judge and jury—and sometimes executioner. They react the exact same way you just did. They don't want to be there. They have low expectations. They get bored from hearing repetitions of insignificant, generic evidence. And they get angry when they've skimmed through your entire proposal and haven't found concrete proof about their central concern: Is their specific problem solvable?

EVIDENCE WINS

Clearly, it's no surprise that the side with evidence wins. Our entire justice system is built on collecting, analyzing, and presenting evidence. No jury—or selection committee—is going to choose the company that presented only a few vague platitudes over the side that presents specific, relevant, and credible evidence on each key point. You know that. I know that. But how do we do it? How do we stop trotting out the same tired map of all of our office locations and start giving them what they want?

STEP 1. PUT SOMEONE IN CHARGE OF EVIDENCE.

The No. 1 reason proposals fail to have persuasive evidence—and, as a result, fail to win systematically—is that no single person has final ownership of the evidence. No ownership means no responsibility. Ideally, the one who owns the evidence should be the same person who is in charge of your content library. After all, winning evidence that no one uses represents time, effort, and opportunity down the drain.

STEP 2. FIND PRE-EXISTING EVIDENCE AND CREATE NEW EVIDENCE.

Fundamentally, your goal is to demonstrate that the perceived value of your solution minus the perceived cost is greater than the perceived value minus the perceived cost of the next best alternative.

$$(p\text{Value}_s - p\text{Cost}_s) > (p\text{Value}_{nba} - p\text{Cost}_{nba})$$

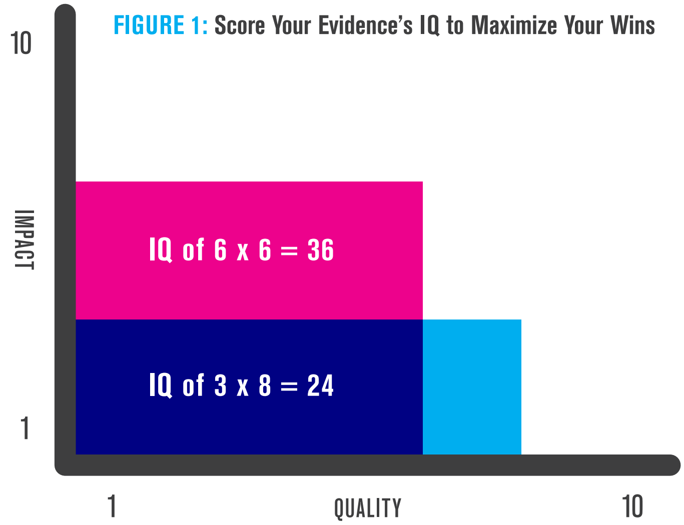
Why is it the *perceived* value and *perceived* cost? Frankly, because the buyer doesn't trust you. You can say your solution delivers a $15 million benefit and costs only $10 million all you want. But the buyer has a word for people who take numbers like that at face value: gullible.

Instead, the proposal reader discounts the anticipated benefit. At a minimum, basic human skepticism lops 20 percent off your stated value—and God help you if you didn't even quantify the value of your solution. If you've never worked with the client and it's a new product or a new service area, those doubts and fears can easily amount to discounts of 50 to 80 percent.

The same is true with costs—but in the other direction. You say it costs $10 million. But they have a dozen other vendors who say it costs only X, when it actually ends up costing X plus Y plus the delays and stress and aggravation. This is the reason for loss aversion, where people demand paybacks of two or three or four times the cost before they'll make a purchase.

As a result, every section of your proposal that discusses the value or cost of your solution needs solid evidentiary support. If you don't have it, you need to find it or create it. If you don't, buyers will either demand much more benefit or much lower prices. Sound like any client you know?

FIGURE 1: Score Your Evidence's IQ to Maximize Your Wins



STEP 3. SELECT THE RIGHT EVIDENCE FOR THIS CLIENT.

The only useful evidence is that which responds to *this* client's fears and desires. This requires effort and collaboration between sales and proposals teams. The RFP may be about help desk services, but the underlying need is probably about cutting costs in response to stock market pressures or increasing revenue to respond to competitors or simplifying the corporate structure. Whatever the client's key fears and desires are, you need persuasive evidence for each one.

So, what makes evidence persuasive? Persuasive evidence has a high IQ, where *I* measures the impact the evidence has and *Q* measures the quality of that evidence. For instance, a case study about a $40 million benefit demonstrates a bigger impact than a $4 million benefit, which is bigger than vague significant benefits. Likewise, a testimonial from a CEO in the same industry as the buyer is higher quality evidence than one from a middle manager in an unrelated field. By scoring the *I* and *Q* of each piece of evidence on a 10-point scale (from the client's point of view) and multiplying them, you get the IQ value of your evidence (see Figure 1).

Your goal is to present, in the course of your proposal, between 100 and 150 IQ points worth of crisp, distinct evidence for each of the client's key fears and desires.

STEP 4. IMPLEMENT A SYSTEM TO REGULARLY REQUEST AND RECEIVE NEW EVIDENCE.

Make it a point to follow up with clients to request testimonials and other evidence. As an added benefit, this system will keep you in much better touch with how they're doing—leading to more satisfaction, more referrals, and more repeat business.

THE 30 PERCENT BOOST

Research we've conducted shows that clients find evidence-backed assertions at least 30 percent more persuasive than evidence-free versions. In fact, we've found that with enough high IQ evidence, clients will completely eliminate their loss aversion and discounting toward your solution. High IQ evidence results in clients who trust you and your solution, and that means you walk away with more wins. ●

Chris Sant is a former commercial litigator who trains clients on the skills necessary to produce proposals as persuasive as the law allows. He can be reached at + *chris@chrissant.com.*

BD

HUNTERS & GATHERERS

Managing Teammate Data Calls

GETTING THE RIGHT INFORMATION AT THE RIGHT TIME

By Mitch Reed, CPP APMP

tip

Use information to develop a group of data call templates and instructions for future use and reuse. This post-submittal effort will result in a smoother data call process for future proposal development efforts and will significantly increase team productivity by reducing the time to manage and develop future data call requests.

WHEN AN INFORMATION REQUEST SEEMS UNNECESSARY OR INVASIVE, IT FEEDS THE TEAMING PARTNERS' NATURAL RELUCTANCE TO TRANSMIT COMPANY DATA CONSIDERED SENSITIVE OR PROPRIETARY.

CAPTURE AND PROPOSAL managers leading large proposal development efforts involving teammates, teaming partners, and subcontractors need to gather critical data necessary to properly prepare and submit a completely compliant proposal to the customer.

Managing data calls with teammates is as much art as it is method. Explored here are basic guidelines and an approach to managing time-sensitive data requests in a way that ensures teammates understand what is needed, why it is needed, and when it is needed—to facilitate complete and timely compliance with data calls.

DATA CALL GUIDELINES

Too often, prime contractors leading proposal efforts automatically cast a wide net for gathering RFP-required information from their teammates, much of which is really not required. This leads to an unnecessary burden on teammates, which are often small companies selected to meet small business goals and promised only a small percentage of the work upon award.

When an information request seems unnecessary or invasive, it feeds the teaming partners' natural reluctance to transmit company data considered sensitive or proprietary. As a result of these information-gathering processes, teams often end up performing unnecessary work or needless rework responding to data calls, which often require legal or senior management approval.

Ensure your data calls follow the simple principle of being considerate of your teammates' time and efforts.

- Guarantee your company and teammates are legally protected through a nondisclosure agreement or teaming agreement.
- Verify your teammates understand what information will be used in the proposal and what information is confidential.
- Ask only for information that is truly required to be responsive to the solicitation, and only when it is required.
- Always explain:
  - *Why* data is needed. Include actual customer requirements specific to a request.
  - *How* data will be used and presented in the proposal.
- Do not ask for information already available or previously provided—minimize their effort.
- Determine which teammates need to provide data—not all teammates may need to provide the same level of information.
- Provide the data call form for your teammates.
- Set reasonable deadlines for the data call response.
- Follow up frequently. If a teammate misses a data call deadline, find out how you can help.

DATA CALL APPROACH

Data required to support a proposal development effort should be identified as part of the overall capture and proposal planning process.

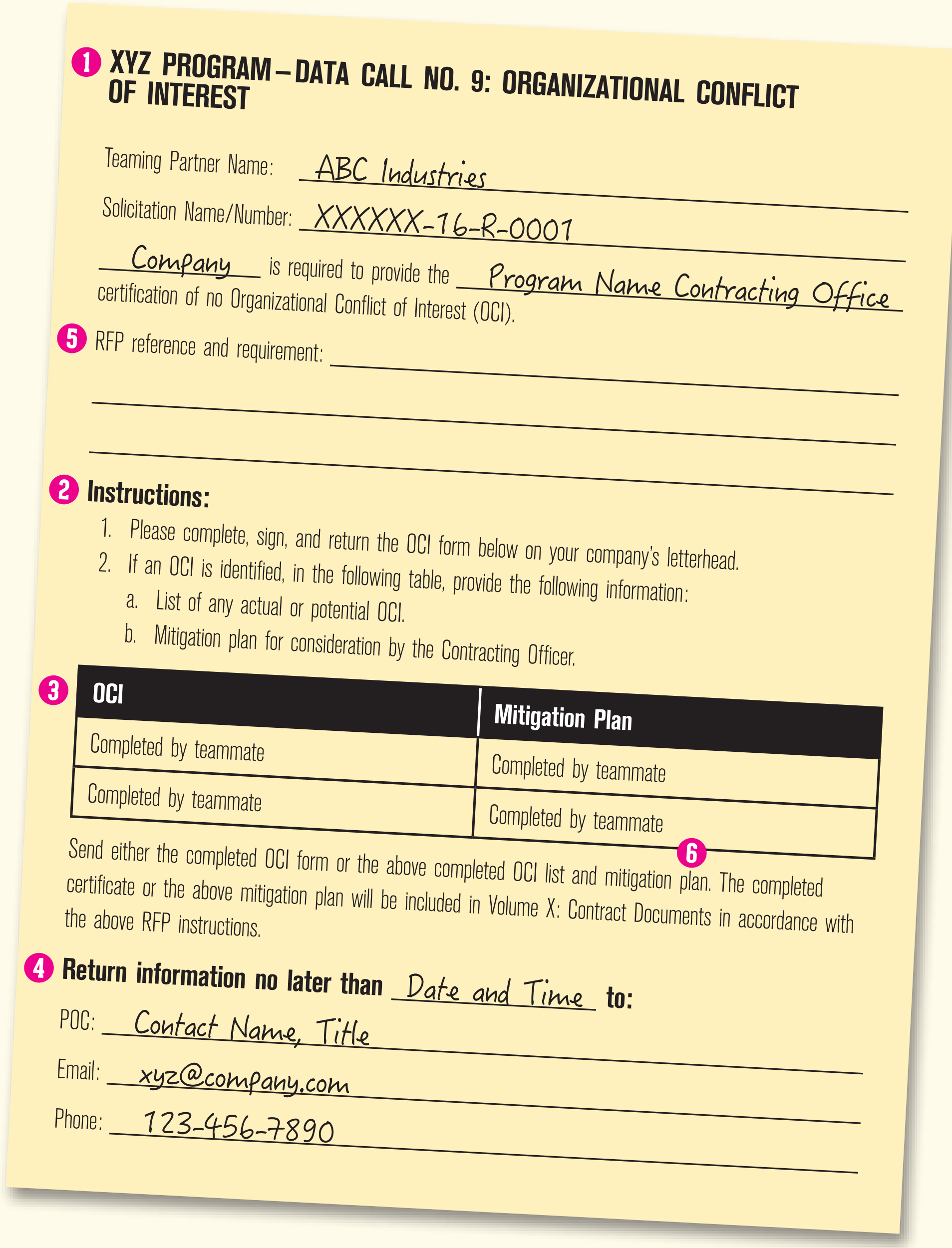
To support the data call effort, this step-by-step process is recommended:

1. **Planning.**
   a. Identify required data.
   b. Record identified data.
   c. Create a data tracking sheet to monitor and manage data calls.
   d. Create data call templates.
2. **Scheduling of Data Calls.** Identify when data call information is needed to support kick-off or production requirements.
3. **Execution.** Send data calls as an email with a form attached for teammates to complete. Request teammates amend the file name with their company name so you can easily identify the source.
4. **Follow-up.** Check the status of data calls daily at proposal stand-up meetings and track data call results.

DATA CALL FORM

Data call forms should clearly communicate the requested data and a method to provide it. The following components should be included on a data call form, as shown in Figure 1.

FIGURE 1
Sample Data Call Form



❶ XYZ PROGRAM – DATA CALL NO. 9: ORGANIZATIONAL CONFLICT OF INTEREST

Teaming Partner Name: ABC Industries

Solicitation Name/Number: XXXXXX-16-R-0001

Company is required to provide the Program Name Contracting Office certification of no Organizational Conflict of Interest (OCI).

❺ RFP reference and requirement:

❷ Instructions:

1. Please complete, sign, and return the OCI form below on your company's letterhead.
2. If an OCI is identified, in the following table, provide the following information:
   a. List of any actual or potential OCI.
   b. Mitigation plan for consideration by the Contracting Officer.

❸

OCI	Mitigation Plan
Completed by teammate	Completed by teammate
Completed by teammate	Completed by teammate

❻ Send either the completed OCI form or the above completed OCI list and mitigation plan. The completed certificate or the above mitigation plan will be included in Volume X: Contract Documents in accordance with the above RFP instructions.

❹ Return information no later than Date and Time to:

POC: Contact Name, Title

Email: xyz@company.com

Phone: 123-456-7890

❶ **Program Name and Data Call Title:** Number data calls sequentially to improve tracking.
❷ **Instructions:** Provide detailed expectations of how information should be returned.
❸ **Data Table or Form:** Format to ensure recipient needs only to insert the desired information.
❹ **Contact Information and Due Dates:** Include phone numbers and email addresses of team leaders, and provide the due date and time.
❺ **RFP Reference/Full RFP Requirement Text:** Detail the need for the requested information.
❻ **Data Use Explanation:** Explain how the information will be used.

DATA CALL SUCCESS

Using a defined data call approach sets the stage for improved subcontractor responsiveness, accountability, and degree of input. The teaming partners' confidence in your company's ability to manage winning programs may also improve. And, most importantly, using this process can establish a professional atmosphere in which to successfully manage the proposal project. ●

Mitch Reed, MBA, CPP APMP, is director of sales operations at Envistacom LLC, author of *Developing Successful Internet Request for Proposals,* and an APMP conference speaker. He can be reached at + *mreed@envistacom.com.*

GP

BRANDING

Putting Your Best Face Forward

HOW GRAPHICS AND DESIGN LEAD TO THE WIN

By Daniel Walker, CF APMP

tip

Reviewers remember 80 percent of what they see but only 20 percent of what they read.

More than 65 percent of people are visual learners.

Flat design is the current trend. Incorporating current design elements will help your proposal look fresh and familiar.

There is an old adage "perception is reality." In the world of sales, perception can mean the difference between closing a sale or scrambling to pinpoint the reason for a loss. Your proposal is a good; as with any good, branding matters. Does a $5,000 watch tell time better than a $25 one? No. So why do people choose the pricey model? Brand and image.

Premium brands command that premium because the design lends itself to a perception of quality. Designing proposals in a clear, attractive manner can lead to this same perception. Here are a few simple steps to ensure your bids, no matter how small or how little time you have, look like billion dollar must-win proposals every single time.

Font matters. Believe it or not, some fonts are more persuasive than others. A study performed in conjunction with *The New York Times* found that the Baskerville font leads 15 percent more readers to agree with a document's premise. Where possible, and within RFP compliance guidelines, use a font that conveys strength and persuasion. But also match your font to the context where it makes the most sense. For example, using a script font in an illustration can lead to a cluttered graphic, while serifs can enhance readability.

Consistent color conveys clarity. Color does more than break up a sea of black and white text—it holds the invaluable power to persuade. Blue is proven to calm, convey peace, and suggest stability. Instantly connect with your customers by changing the colors of your graphics to match their palette. For example, a bid to Ford could be heavy in blue to match Ford's famous blue oval, while one to Marriott could carry red to match the company's big red M. Check out the Pantone database to be sure you're accurately representing your customer's brand.

Using the same suite of color on every page of your bid offers cohesion that puts your reader at ease. Color can subtly lead your reviewers to a solid conclusion and add credibility to your bid.

Use graphics to tell your entire story. Your reviewers are busy. With this in mind, your graphics can—and should—tell your entire story. Time and again at debriefings you may have heard, "I just skimmed your graphics and made up my mind." Timelines and infographics offer large swaths of data at once and can provide a road map for your entire proposal (see Figure 1).

For graphics, less is more. From corporate ad campaigns to your iPhone's home screen, the days of shiny splashy graphics are over. The look today is flat design, where glossy finishes and 3-D effects are replaced with clean stark graphics that convey a point without pizzazz. The reasons to embrace this trend are twofold. First, by converting to flat design, you present an updated face, showing your firm clearly understands trends. Secondly, flat design is simple and fast, which saves you time on the development side.

FIGURE 1: A one-page executive summary (left) provides concise, recognizable headers for later sections (right).

Don't assume your bid will ever be printed. As more proposals go digital, readers may never touch a physical copy of your bid or even read it on a full-sized device. Use downtime to optimize your templates for mobile devices and use high-contrast colors that can be easily distinguished on a screen washed out by sunlight. Consider the "proposal on a page": a mobile-optimized, graphic-centric, interactive document containing all the proposal elements, from qualifications to price. By leveraging the possibilities of these new technologies, you demonstrate a commitment to innovation that sets you apart without saying a word.

NO MATTER YOUR INDUSTRY, CUSTOMER-FOCUSED, STATE-OF-THE-ART DESIGN CAN PROVIDE THE EXTRA EDGE THAT LEADS TO A WIN.

INVEST IN A GRAPHICS REVOLUTION

These steps take time, but the good news is that now it's easier than ever to put a consistent look and feel into every proposal you create. Many graphics tools are built into the programs you use every day and allow you to quickly create easily editable graphics.

No matter your industry, customer-focused, state-of-the-art design can provide the extra edge that leads to a win. Consistency of color, clear design, and graphics tied to a unified theme throughout a proposal lead to credibility and ease the reading process. When readers can easily review your proposal, they can assume your firm will also be easy to work alongside, which is the very essence of a win. ●

Daniel Walker, CF APMP, is a proposal writer and graphic designer with more than 10 years of experience leading complex bids to federal, state, and Fortune 500 customers. He helps small businesses, large consulting firms, and not-for-profit organizations through branding, writing, and design to create compelling proposals. He may be reached at + *daniel@danielpaulwalker.com* or 202-643-2451.

PM

TECHNOLOGY

The Online Portal Challenge

HOW TO WIN IN A DIGITAL WORLD

By Melanie Gibbs, CP APMP, and Teresa Lyle, CP APMP

Online procurement sites are changing the way proposal professionals respond to RFPs. With these changes, best practices are becoming increasingly difficult to follow. By limiting the amount and format of data that can be submitted, online portals make it challenging to provide persuasive responses that highlight true differentiators and show the benefits of a solution. Presented here are some proven workarounds that enable you to tell more of your story in e-procurement submissions.

THE EXECUTIVE SUMMARY LOCATOR

The executive summary—one of the fundamental best practices of proposal management—is usually where solution-supporting information is presented, yet e-procurement sites rarely ask for one. That does not mean you should abandon the executive summary.

In some cases, the RFP instructs respondents to upload "additional information" as an attachment in a specific place on the portal. This is the perfect location to add an executive summary. If that opportunity is not provided, look for questions or sections of the portal that do allow attachments and see if any of those lend themselves to an executive summary upload. It may be necessary to label the executive summary as something else to ensure its inclusion in the submission.

THE DROP-DOWN MENU CIRCUMVENTION

Online submissions present another challenge to our best practices: specifically, writing customer-focused responses that emphasize benefits over features. When e-procurement sites allow only certain answers—often just a yes or no—from a drop-down list, the choices are often not completely accurate, and they do not allow the whole story. To tell the story amidst those tightly controlled question sets, consider the following complements to your drop-down answers.

- Brief narrative response sections or comment fields, though often the character count for these is limited.
- Attachments, which provide space to spell out benefits related to the feature in question or to explain an answer (an icon like a paper clip or plus sign might indicate an attachment is accepted, even if attachments are not mentioned in the instructions).

If the question does not allow a long answer or an attachment, look for the next closest question that does. Always refer to the question number you are addressing so your answer is not lost or misunderstood.

PICTURE THIS

Successful proposal strategy suggests that a picture is worth a thousand words, but including graphics or images in portals can be tricky. A workaround for this challenge is to embed images in the executive summary or upload them as separate attachments. A word of caution: When including attachments, review the RFP instructions concerning uploaded files, specifically those regarding file types, sizes, and naming conventions. For uniformity among attachments, have an exhibit template ready and choose file names that allow the client to easily recognize which attachment addresses which question.

PRINT DOESN'T PUT YOU IN A BIND

Often the answers you enter in the portal are parceled out to select subject matter experts, and the entire value proposition never reaches a single individual. In those cases, you may want to think outside the box to maintain control. For instance, you can print copies of your responses after the online proposal has been submitted and send proposal binders, complete with collateral, to the decision makers. There is no guarantee the hard copies will be read, but they at least encourage a full review.

OBTAIN YOUR WIN

As e-procurement becomes more common, proposal teams do not have to give up on best practices, but they do need to find new ways to tell their stories. These solutions have proved helpful in obtaining wins in an increasingly digital world. ●

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Commercial

Winning With a Commercial Proposal Checklist

By Lori Mathews, CP APMP

Efficient and organized planning is critical in preparing a responsive proposal. To meet the challenge of preparing commercial proposals, it is helpful to have a tool to assist with the organization, tracking, and preparation of the proposal outline and schedule in one comprehensive document. The proposal checklist accomplishes that.

The commercial proposal checklist contains seven sections in one document:

- Key proposal information
- Proposal outline (compliance)
- Schedule (drafts and final)
- Assigned personnel
- Win themes
- Evaluation criteria
- Action items

The checklist has many benefits, but the most crucial is that it simplifies the proposal process and makes it more efficient for the proposal manager and the capture team. The checklist serves as the main reference document throughout the entire proposal process, minimizing the time spent looking through the request for proposal (RFP) documents for requirements and allowing the team to build compliant, responsive proposals from the beginning. With its built-in schedule, the checklist maximizes efficient tracking of all proposal sections. It also incorporates win themes and evaluation criteria into the proposal and provides a concise list to include in the proposal response.

CHECKING THE CHECKLIST

The proposal checklist contains critical information (i.e., due date and time, proposal name, proposal number). Commercial proposal documents often have instructions sprinkled throughout emails, cover letters, instructions to bidders, addenda, and bid forms. All of these requirements are recorded in the proposal checklist as part of the proposal outline section. The proposal requirements are listed on the checklist along with the location of the item in the RFP (section and page number), preventing time wasted in recalling where the item was found.

Once all items are recorded in the required sections, the proposal outline section of the checklist can be reorganized to focus on your key selling points (closer to the top of the outline) and to include optional proposal submittals. Draft and final due dates are listed, from which you create your schedule and assignments. The last components are a summarized list of win themes, evaluation criteria, and action items.

IT'S ALIVE!

The proposal checklist serves as a resource for the entire capture team and becomes part of the agenda for the proposal kick-off meeting. It is a living document that should be updated throughout the proposal process to record changing information, such as client answers to questions or addenda. The proposal outline section of the checklist also becomes the basis for a compliance matrix with the addition of page numbers. As items are completed, they are tracked for compliance within the checklist.

ON SCHEDULE

The proposal schedule is one of the most important aspects of the proposal process. The checklist allows easy tracking of draft and final due dates. You can monitor progress and easily identify if the schedule needs to be adjusted or if the capture team isn't meeting deadlines. Win themes are also reviewed from the summarized list on the kick-off and check-in calls.

QUALITY CONTROL

Proposal managers can use the checklist when performing quality control reviews, ensuring all sections are as they should appear in the final proposal. The checklist can also be passed along to other reviewers to perform additional quality control evaluations. Consider using the checklist during the "best and final" proposal phase after the proposal has been submitted. It can serve as an outline for post-bid interviews.

TIME WELL SPENT

The most significant feature of the proposal checklist is its ability to be used at-a-glance. It keeps the process efficient, organized, and easy to follow. Time is one of the most critical elements in the overall proposal process. The proposal checklist is a comprehensive tool that maximizes efficiency and thereby increases the time you can focus on preparing your winning proposal. ●

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Federal

Cutting Through the Red Tape

By Ali Tweel, CF APMP

As the source of millions of dollars in contracts a year, the federal sector can be very lucrative. Because its payment obligations are backed by the full faith and credit of the U.S. government, you can expect a responsive client that pays its bills on time. Securing a Multiple Award Task Order Contract can place you in a small pool to bid on numerous contracts worth millions of dollars. However, navigating this world requires specialized knowledge. It's extraordinarily easy to be kicked out of the bidding process or to be deemed technically unacceptable.

To participate in federal procurement, you must first obtain a Dun & Bradstreet number. You will then need to register as a government contractor in the System for Award Management and register at least one North American Industry Classification System code.

IDENTIFYING ELIGIBILITY AND RESOURCES

The government offers significant advantages for small or disadvantaged businesses, with statutory annual contracting goals designated for them. To more easily compete for federal contracts, consider reviewing your eligibility for programs such as HUBZone, 8(a) Business Development, or Service Disabled Veteran Owned or Women Owned Small Business. You may also be eligible for loans or grants. Partnering with a large business through a mentor program is a great way to leverage a greater pool of resources to get your foot in the door. Your local Procurement Technical Assistance Center and Small Business Administration district office are great resources for counseling on government contracting, including technical guidance and matchmaking with federal buyers.

COMPLYING WITH REGULATIONS

The Federal Acquisition Regulation (FAR) provides uniform procedures for government procurement and acquisition. These include guidelines related to contract administration and financing, pricing, foreign acquisitions, conflicts of interest, selection procedures, bonds, late bids, and subcontracting policies. Typical commercial business development practices (e.g., buying gifts for your government client or contracting officer) are forbidden and can lead to significant penalties. Be sure to read any FAR provision referenced in your RFP, and consider taking a FAR course to better understand these regulations.

FINDING RFPs

FedBizOpps.gov is the premier source for federal government procurement opportunities that exceed $25,000. Through this portal, you can create search agents to find relevant RFPs, presolicitations, sources sought notices, and more.

KEEPING IT SIMPLE

Federal RFPs commonly contain language advising that proposals be prepared simply and economically and provide a concise description of capabilities. Underlying these principles are the Plain Writing Act of 2010 and the Federal Plain Language Guidelines, which require that federal agencies use "clear government communication that the public can understand and use."

You can make your writing more concise by:

- Avoiding dense paragraphs and long sentences.
- Using graphics to clarify text and communicate complex ideas, solutions, or processes.
- Avoiding jargon, redundancy, clichés, technical terms, and abbreviations.

ADHERING TO RFP REQUIREMENTS

A compliance check is often the first round of an evaluator's review. Your proposal can be eliminated for something as minuscule as the wrong font. Structure your proposal per the RFP, following the nomenclature, font and formatting, headings, and chronological organization.

GRASPING THE PROCUREMENT MODEL

Review the evaluation criteria to understand the procurement model being used, as this will drive your strategic direction. For instance, under the best value tradeoff source selection procedures, the government weighs nonprice factors (e.g., past performance) as equal to or more important than price. Alternatively, the lowest price technically acceptable source selection process rates other noncost factors as acceptable or unacceptable and then selects the lowest bid out of the acceptable proposals.

DEBRIEFING AFTER THE PROPOSAL

Upon notification of the contract award or exclusion, request a debriefing. This will include the agency's evaluation of significant elements in your proposal and the basis for the selection decision. Debriefings can serve as a constructive tool for lessons learned and best practices. FAR Subpart 15.5 provides further information on the debriefing process and elements. ●

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THE RIGHT STUFF

THE COMBINED POWER OF PEOPLE AND TECHNOLOGY

By Frank Candido and Colleen Allen, Scientific Games

When you are faced with a daunting number of RFP opportunities, it can sometimes seem as if your best hope is to simply keep up. After all, if you are submitting high-quality proposals by the deadline for all the opportunities that fit your company's capabilities and business strategy, that's success, right?

You may have your head above water, but you are most likely exhausted. And if you maintain the same pace, what is going to happen next year? And the year after that, when the waves of RFPs come bigger and faster, what then?

MEETING TODAY'S NEEDS WHILE PREPARING FOR TOMORROW

While you are responding to the RFPs in front of you—maintaining or improving your win rate—you must also prepare for the expected greater numbers of RFPs that will come in the future, which will likely increase in their complexity and technological sophistication. To do so, you need to build your proposal department's response capability by evaluating your team, technology, and processes.

HERE ARE SOME STEPS YOU CAN TAKE:

- Using APMP best practices, find both theoretical and applied techniques and methodologies to get you moving in the right direction.
- Work with industry providers to identify technologies and tools that you can implement to get your team to the next level of proposal capabilities.
- Onboard new team members who fit your department's needs today and your anticipated needs in the future.
- Enlist the support of senior management, sharing the potential advantages of the departmental changes regarding increased opportunities and wins.

CASE EXAMPLE: SCIENTIFIC GAMES

The global proposals team at Scientific Games took on the challenge to build a new team that would meet the organization's future needs. The team quickly discovered that there were two critically important areas that needed clear and determined focus: people and technology. Intrinsically intertwined in today's proposal department structure, these two areas should be addressed together for the best chance of success.

The team focused on inquiry and discovery when developing an opportunity management life cycle process. The process is continuously tweaked based on suggestions from global proposal team members who live the process daily—the opportunity director, managers, coordinators, writers, and production team members.

DISCOVERY AND STRATEGIC APPROACH

1. **Evaluate existing capability, tools, and processes.** In 2010, the Scientific Games team completed a survey of its ISO-based proposal process and looked at the tools that existed in the department. The survey compared the capabilities of the department's team members with its needs using a process engineering review approach and how those capabilities fit with long- and short-term goals.
2. **Select next steps.** The team determined what actions were necessary to support its goals (e.g., win rate, proposal volume, and the ability to handle the growing complexity of RFPs).
   - Redesigned the process to incorporate APMP best practices and focus on key proposal response events—kick-off, Pink Teams, Red Teams, quality reviews, production reviews—to improve overall response quality.
   - Hired new proposal managers who are certified as APMP Foundation-level (or better), or who could quickly achieve APMP certification, to handle the increased volume and complexity of upcoming RFPs (2011–2015).
   - Implemented a quality initiative, with a proposal quality manager who leads training or quality programs with proposal managers and production teams.
3. **Identify best practices.** The team researched vendor solutions and industry best practices and found APMP an important repository of experiences of thousands of industry professionals. Team members attended annual and regional conferences that put vendors, presenters, and users all in close proximity. During this stage, the team:
   - Sourced a vendor system for proposal database management that would best fit its proposal content management needs.
   - Found new ways to integrate international and virtual teams needed to respond to bid opportunities from 2011 to 2015.
   - Identified collaboration tools to facilitate real-time edits and content updates.

- Eliminated paper-based procedures, adopting fully electronic proposal content generation, collaboration, and production.
- Moved from a proprietary bid production platform to a more efficient platform that allowed for more collaboration and proposal development time.

4. **Get organized.** The team then focused on improving its tracking of RFPs—by business unit and by location.
   - Established a sales logging tool that captured expected RFPs for each business unit with key metrics to allow for bid/no-bid decision making.
   - Centralized domestic and international opportunity reporting organized by business unit, to help determine RFP volume and team requirements.
   - Developed an opportunity plan of upcoming RFPs, establishing a timeline (24 to 36 months) for expected RFPs and tracking with sales teams worldwide.

IMPLEMENTATION, EVALUATION, AND CONTINUOUS IMPROVEMENT

Finally, the Scientific Games global proposals team implemented the solutions and procedures it had identified as delivering the highest guarantee of success. Carefully selected new team members were brought on board and developed internally. After implementing off-the-shelf tools and programs, the team integrated custom applications and created new reporting to better engage the business teams and senior management in the company's RFP success.

As soon as anything new was implemented, the entire team was asked for suggestions for expansion or improvement. Feedback was critical to reinforce good choices and to quickly adjust some processes to better meet the diverse needs of the users and business teams.

The team measures its success based on the following results.

- Over the past three years, bid response efficiency has increased while response time has decreased.

- Morale has increased among proposal team members, business teams, and subject matter experts engaged in generating proposal responses.

Three surveys have confirmed that the team is headed in the right direction and has accomplished many of the goals it set out to achieve. Impromptu mini surveys and reports continue to provide real-time input into the team's journey. Senior management has recognized the improved process and increased focus in advance of RFPs and appreciates the more advanced opportunity management process in place today.

KEY LEARNINGS

The Good

- People come first. Invest in their training and support; maintain flexibility.
  - There is usually not just one right answer (tool or process) but also a combination of many.
  - A change in corporate culture is not possible without the support of senior management.

The Bad

- The amount of energy needed to implement change can be surprising at times.
- Expect learning curves, especially with technology.
- Change is hard. There is often resistance at the beginning: "What is wrong with the way we were doing it?" Be persistent.
- Demonstrating the value is key to quickly gaining buy-in from upper management.

The Ugly

- The first 90 percent of change is easier than the last 10 percent. It is like losing that last 5 pounds.

While this is a challenging process, immense satisfaction comes from aligning the technology and people on your team to better meet the challenges of the proposal effort for the coming year and many years in the future. Winning RFPs and obtaining new contracts that allow your company to secure everyone's future is a very valuable contribution that your new proposals team can make. ●

Scientific Games is a leading developer of technology-based products and services and associated content for worldwide gaming, lottery, and interactive markets. **Frank Candido,** senior director of global proposals, leads a team of professionals in pursuit of complex B2G and B2B opportunities globally. **Colleen Allen,** director of opportunity management, collaborates with business teams across the company in pursuit of opportunities in the long-range business pipeline. They can be contacted at + *frank.candido@scientificgames.com* or + *colleen.allen@scientificgames.com*.

ENVISION THE PROPOSAL OF 2020:

An Interactive, Multimedia Product

By Mitch Boretz, APMP Fellow, and Tim Russell, CF APMP

The paper proposal is rapidly becoming an anachronism in a world of connected, interactive, and multimedia communication. APMP has been working with procurement professionals and grant-making agencies over the last few years to define what the next-generation proposal will look like. While there is not yet a common, unified vision, it is clear that proposals in the near future will be embedded with “rich media” to help communicate the proposed solution and help the reviewer find salient information. This is less of a technological leap than you might think, but it will require proposal professionals to rethink approaches and add new skills to the team.

ELECTRONIC AND MULTIMEDIA SOLUTIONS

All parties involved in a procurement have the same objective: to secure the right solution for a need. Customers need to clearly communicate their requirements, and prospective vendors need to communicate why their solution is the right choice. Typically, the tools and processes utilized are decades, even centuries, old—for example, the now-standard 8 ½ x 11-inch page dates back to the 1600s. If we systematically introduce electronic technologies, we can build a procurement ecosystem that communicates more effectively, operates more efficiently, and produces the desired outcome—selection of the right solution—more consistently.

These are not radical changes. Proposals will still focus on the quality and clarity of the content, but it is possible that a proposal will look and feel more like a website than a book. Key features may include the following:

- **Electronically delivered solicitations.** Amendments are numbered and dated consistently, and revisions are highlighted. Many agencies do this well, such as the U.S. Department of Energy. On the other hand, amendments to a U.S. government solicitation disseminated via FedBizOpps and Grants.gov do not necessarily have the same amendment numbers and dates on both systems. Systems can also be designed to require bidders to acknowledge receipt of amendments.
- **Proposals prepared offline but securely submitted online.** The best online systems keep the user online for the least amount of time. Also, all requirements must be in the solicitation; the online system should not have any surprises. Some systems, for example, require a “lay abstract” before a proposal can be submitted, but the proposer may not be aware of the requirement until it pops up on the screen just before submission.
- **Self-contained and downloadable proposals, enabling evaluators to work offline.** For numerous reasons, the evaluator should not have to follow external links.
- **Interactive and multimedia features to support the proposal’s main ideas.** Interactivity allows for another level of engagement with the proposal. Compliance matrices can link reviewers directly to content in the proposal that addresses each evaluation criterion; mouse overs incorporate further backup information (see Figure 1); and audio or video clips, as appropriate, can bolster claims of prior successes. It is important to note that we do not envision a video proposal; we envision video *in* proposals as a tool to help communicate the solution.

Many components of this new ecosystem are maturing—and that is the problem. If the community does not set policies and standards, it will continue to evolve piecemeal: some good, some bad. Signs of this are already evident in everything from proposal systems that accept only plain text to ad hoc systems that accept videos by arrangement.

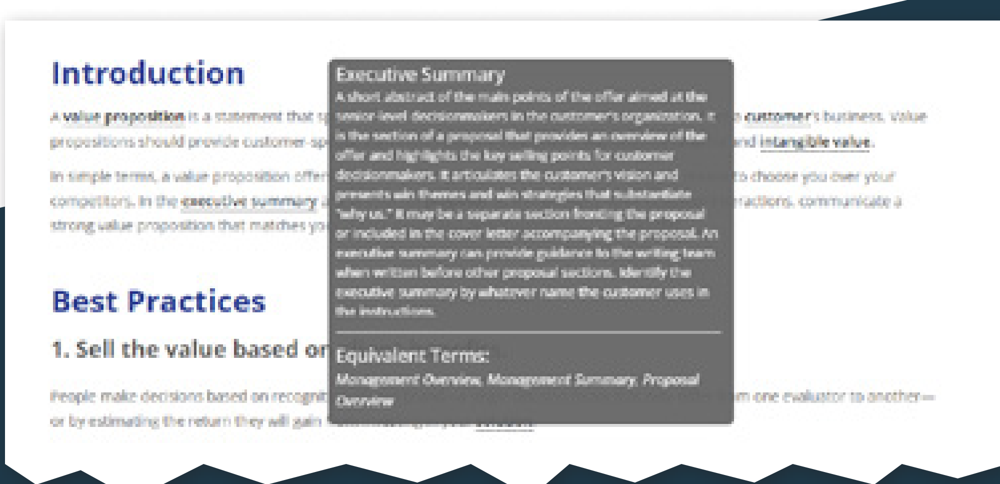

FIGURE 1
Mouse overs offer an opportunity to provide additional information to reviewers.

FIGURE 2
This PDF contains an embedded video file that elaborates on the document's content. When an image is clicked, the video appears in the document, much like in a web page, and includes full playback controls. This functionality exists in Adobe Acrobat Player.

CHALLENGES AND QUESTIONS

The purpose of this transition is to make communication more effective, not to add complexity, cost, or entertainment value. The interactive compliance matrix allows a reviewer to get to the required information at the click of a mouse. Video files can be compressed to a small file size while maintaining a high level of quality. These interactive features can easily be incorporated into PDF proposals, as seen in Figure 2.

Cost and complexity are not really barriers to integrating rich media into procurement processes. Word processing and spreadsheet programs already are capable of integrating bookmarks and hyperlinks, and brief videos can be produced and edited easily and at a low cost compared with just 10 years ago. But the question of how to modernize systems requires answers to several policy issues:

- Must videos include captioning, to be in compliance with the Americans with Disabilities Act?
- Should there be limits on the total duration or file size of videos in proposals?
- Should there be a standard window size for videos, to accommodate viewing on a computer, tablet, or handheld device?
- Should there be rules about nonessential information, such as background music?
- How should a contract based on a proposal that includes multimedia or dynamic content be written?
- How should the proposal content be locked and used as a basis for the procurement agreement?

All of these questions are tractable. APMP and, to a limited extent, the Federal Demonstration Partnership have considered some of these questions already, and a broader discussion should lead quickly to a policy framework.

The challenge with incorporating rich-media technologies into the proposal development process is not with the technology itself. Rather, the challenge lies with establishing the standards by which the technologies function within the procurement ecosystem. APMP will continue to work with partners across the table to define the ecosystem of the future—one that makes appropriate use of advanced technologies for successful procurements. ●

Mitch Boretz, APMP Fellow, directs proposal operations for the Bourns College of Engineering at the University of California, Riverside, where the vast majority of the 400 proposals produced per year are submitted online. He has more than 20 years of experience in contracts and grants for technology development, environmental, and educational programs.

Tim Russell, CF APMP, is the marketing manager in charge of proposal development at the Boston headquarters of Simpson Gumpertz and Heger Inc., a national engineering firm that designs, investigates, and rehabilitates constructed works.

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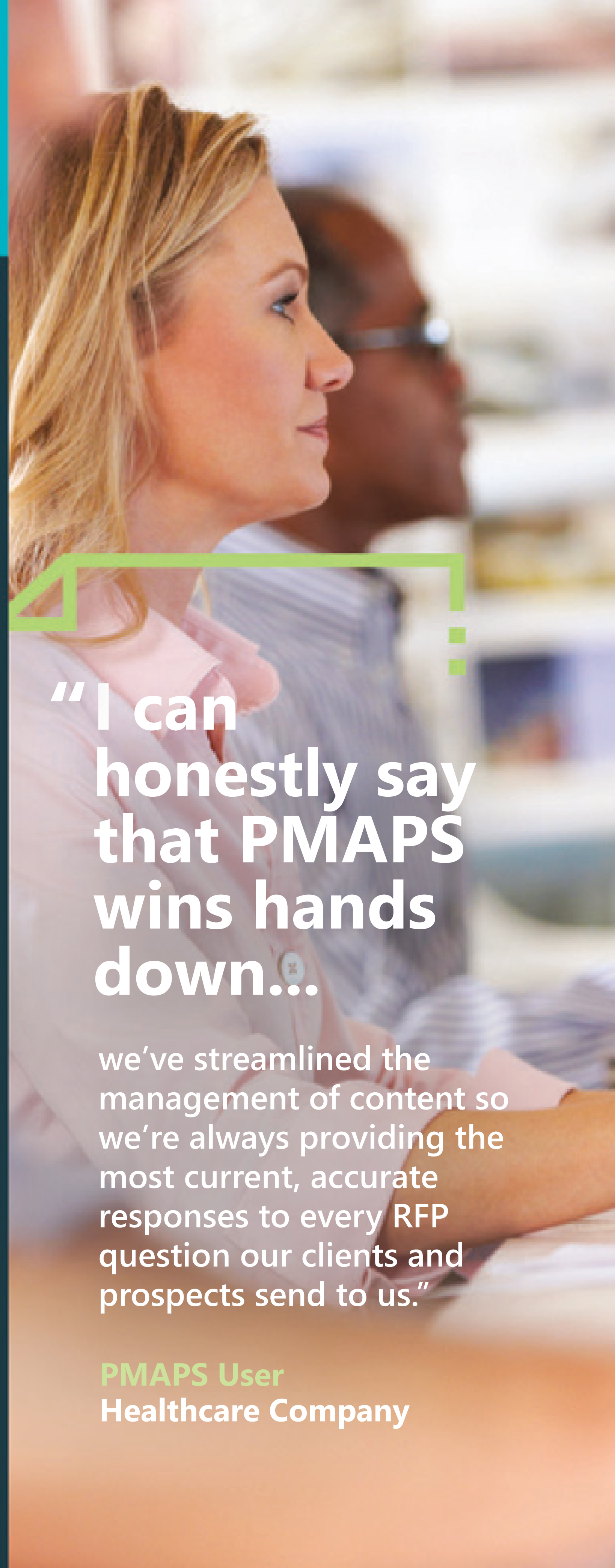

"I can honestly say that PMAPS wins hands down...

we've streamlined the management of content so we're always providing the most current, accurate responses to every RFP question our clients and prospects send to us."

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