journal

VOLUME II NUMBER I // 2014

APMP

Your Professional Guide to Winning Business

+

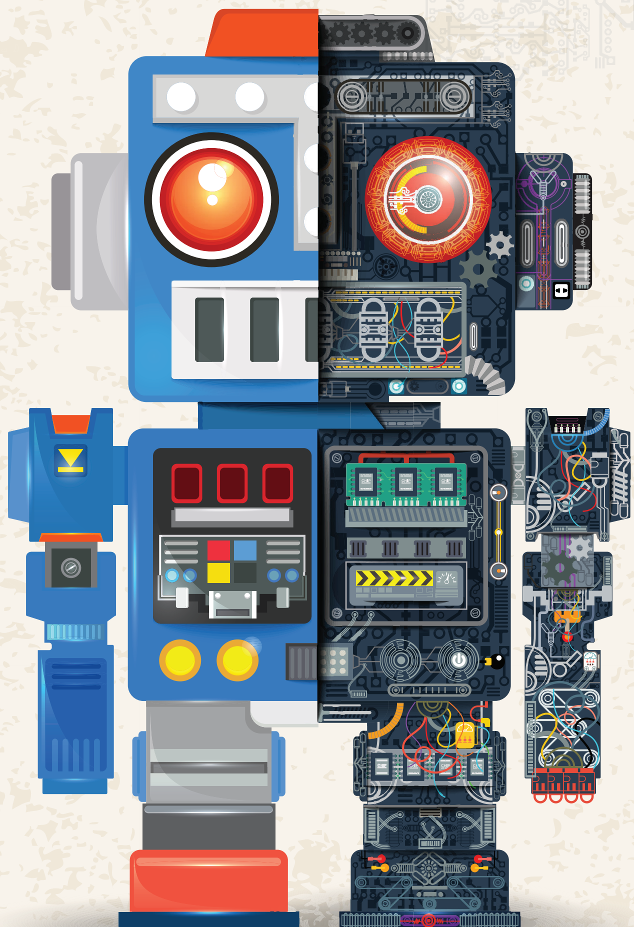
STEVE JENSEN—MEET THE MAN BEHIND THE CURTAIN

YOU'RE THE INCUMBENT, DON'T RELAX NOW

SORTING THROUGH THE CLUTTER

3-D PRINTING FOR THE ROYAL FAMILY

THE NEW WORKPLACE—ANYWHERE



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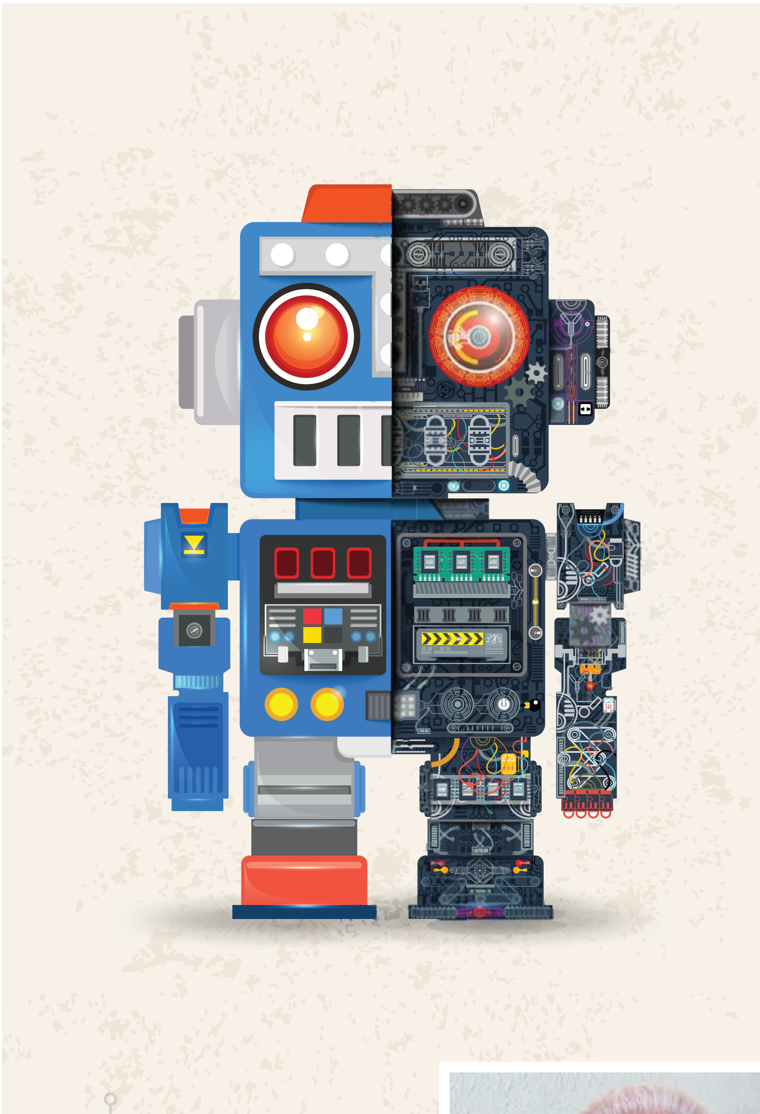

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FROM APMP'S EXECUTIVE DIRECTOR

BODY OF KNOWLEDGE (BoK)

Your association is working on a project that is one of the most important in its history—The APMP Body of Knowledge (BoK).

Last September, APMP's Board of Directors voted to fund the creation of an improved APMP BoK to serve as the industry's primary resource of best practices for proposal professionals.

In March 2014, Dragonfly Editorial was selected to provide editorial services and manage the project. By the end of 2014, every APMP member will have access to the BoK and its contents at no additional cost to them.

So, why all the fuss and hullabaloo? A BoK is critically important to this association because, once published, members can take pride in that we have come full circle and have become an *industry*. We are no longer just a collection of thoughts, opinions, and war stories. Instead, we will be a collective association that stepped forward as an industry to say, "These are our best practices."

Accomplishing this goal will mean something. We will have taken the best and the brightest in APMP to write, edit, vet, and publish an industry standard, completed *together*.

The BoK will be the *ultimate* resource for our members. Most important, the APMP BoK will become the beating heart of the association, the living and breathing document to which we can all point.

I want to thank past APMP CEOs Kirste Webb and Betsy Blakney, who believed in this project enough (and still do) to make it a part of the association's priorities in 2010 and 2011. APMP's 2013 Board of Directors should be applauded for approving this and giving APMP a promising future.

We welcome each member's help. If you have related ideas, please let me know at + *rick.harris@apmp.org*.

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—Eric Gregory, SVP Consulting East
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FROM APMP'S
CEO

APMP VISION FOR 2014: PROFESSIONALISM

The APMP community has always been comprised of professionals: managers or writers involved in sales or other parts of the complex proposal environment. When working outside of their immediate community, many proposal professionals express frustration that their "job" is not always understood. Other members seek to expand their knowledge, understand best practices to efficiently accomplish their goals, and earn a certification of expertise easily recognized by supervisors or potential new employers. Still, others seek communities of like-minded individuals with whom to network and learn, expanding their personal education.

This year, we continue to unmistakably elevate our association as a professional one, engaging, educating, and informing senior-level stakeholders within corporations and governments around the world while providing opportunities for current members to thrive.

Specifically, we work within three areas to further our association's visible expression of professionalism, internally and externally:

Career. We strive to create career-path guidelines in relevant terminology, reflective of international business norms. This provides members and companies with a framework to understand and develop plans for talent acquisition, management, and expansion. We continue research projects, including salary and community demographics, to provide the most accurate and timely information about the industry as a whole.

Certification. Our certification program is consistently ranked the No. 1 member benefit. We continue to confirm this program is representative of industry best practices through capturing the amazing quantity of information in our own *Body of Knowledge*. This material will flow through to future certification updates, ensuring the program is vendor-neutral and representative of the international bid and proposal community.

Community. We have developed communities that reflect not only our geographic diversity with local chapters, but also several organized around content as well. Members may connect based on common interests through webinars and in-person educational or networking events to further their professional networks and personal growth.

Solid foundations have already been laid, but we still have work to do. We move forward, enhancing and highlighting the professionalism already present in our association and in our members, to a day when "proposal professional" is a career as clearly understood and sought after by the next generation of leaders as physician or lawyer was in the past.

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TRACK RECORD

We Don't Have to Worry–We Are the Incumbent!

YOUR COMPETITION IS IN IT TO WIN IT, SO DON'T LET YOUR GUARD DOWN

By Andrew Haigh, CPP APMP

YOU ARE THE INCUMBENT supplier in a complex contract, and it is being routinely rebid. You and your team have been doing a fantastic job for years. You know you have the client's staff on your side because they tell you that your team is doing a good job, and you have rescued the client's business from several—indeed many—disasters of their making in recent months. Relationships are good and when issues arise, they are sorted out quickly, no matter where the issues originated. Altogether, with such a good track record, winning the rebid will be a cinch.

OR WILL IT?

A very high proportion of incumbent suppliers lose in this situation, even when the client wants them to win. Having analysed some of these situations, I believe the reasons for such high failure rates are based on a few repeated areas of weakness.

FIRST, A GOOD TECHNICALLY COMPETENT BID FROM THE INCUMBENT CANNOT WIN ON ITS OWN.

This is because the competition is in it to win it. The competitors will have predicted the main strengths of the incumbent (that of a proven track record and no new supplier transition costs), and they will have clear strategies to deal with and overcome incumbent advantages—otherwise they would not be bidding. So the competitors must already have a good technical solution, which they will claim has such overwhelming advantages for the client that it will outweigh all the problems of transitioning to a new supplier.

SECOND, THE INCUMBENT IS HESITANT TO PROPOSE A TRULY INNOVATIVE SOLUTION OR TO SLASH COSTS.

Why? To do so might imply to the client that the incumbent has been "ripping them off" and hasn't been as innovative as it led the client to believe in the past. Otherwise, why wait for a rebid to propose something new or cost-saving? Many incumbents' account managers play it safe and only allow some tinkering with the current solution rather than promoting a truly innovative option.

Of course the competitors won't be hampered by these concerns. They will all be working from the perspective that unless innovation is fully demonstrated, they cannot win. They will be positively encouraging radical thinking from within their bid teams.

FINALLY, THE INCUMBENT IS FREQUENTLY BLIND TO ITS OWN ARROGANCE, AND ITS MANAGEMENT IS A BIT COMPLACENT.

They think, "With such a tremendous track record to date with this client, why should we have to prove ourselves anymore? The client knows how good we are!" Plus, the entire team is blissfully unaware of the competitive intelligence advantage the competitors already have.

The competitors will have been analysing the incumbent's track record with its client in great detail. Every issue and failure will have been researched. They will then show in the proposal how they could have avoided or produced a better solution to these situations if they had been operating the contract. They can make all these claims using hindsight, but the incumbent cannot change its history, good or bad.

SO, IF YOU ARE THE INCUMBENT, WHAT CAN YOU DO? WELL, UNLESS YOU HAVE A TRULY COMPETITIVE PROPOSAL, YOU CAN ONLY WAIT FOR THE CONTRACT TO BE TAKEN FROM YOU!

The only way to stay in contract with the client is to approach the tendering competition expecting that every other competitor is going to claim it can do the job better and less expensively than you have done to date. Anticipate that the competitors will try to justify these claims in their bids; then start your rebid proposal planning on this basis.

THE INCUMBENT HAS 'INSIDE' KNOWLEDGE, SO COME UP WITH A GAME-CHANGER THAT YOUR COMPETITORS CAN'T FORESEE.

Firstly, look for real innovation, and don't be afraid to use it.

Secondly, slash your costs as far as you can (but always balance this against the impact on the quality of your solution).

Thirdly, use your knowledge of the client and its customers. What does their team really need? What will truly impress your client? You have "inside" knowledge, so come up with a game-changer that your competitors can't foresee, but that you know your client will want.

Finally, forget that you are the incumbent. Pretend that your most feared competitor had been operating the contract and that it had performed well. Now show your client why you are the better choice. ●

Andrew Haigh, CPP APMP, of Sixfold International Ltd, has more than 20 years' experience in formal bidding. Contact him at 44-1227-860375 or + *andy@sixfold.biz.*

VALUE FORMULA

How Do You *Really* Influence a Customer?

SHOW ENOUGH VALUE TO BE CONSIDERED

By Dr. Larry Phillips

IT'S VERY EASY to fall in love with the solution we offer to customers—so much so that we try to sell it based on the "cool features" without understanding how the decision maker will actually choose a provider from several offers. Nobody buys the features of your offer, but they do buy the benefit you offer if it meets that decision maker's subjective assessment of its value.

Research done by leading experts, including Kanheman, Tversky, and Gigerinzer, all show that when faced with a complex problem, decision makers believe they are using a very complex and rational decision-making process to objectively determine what the Best Value (BV) choice is, when they are actually using a very simple and subjective process. The key to understanding how to successfully influence a buying decision in favor of your offer is to understand how this process works.

A decision maker's assessment of an offer's Value (V) is actually a personal assessment of Trust (T), Risk (R), and Benefit (B), which are then compared in a weighted relationship. Best Value (BV) is assessed by comparing multiple V assessments against Price ($). This decision process is called a heuristic, and while it does not predict what the decision will be, it does show how the TRB concepts interact and where influence points are.

Let's start by looking at the TRB elements. Data from research using a sample size that statistically replicated the population of the United States with an error rate of <4.5 percent and a confidence level of >97 percent clearly supports the following assertions:

1. Perceptions of T and B mitigate perceived R for the decision maker.
2. Perceptions of T and B have a synergistic ability to mitigate

high levels of R (i.e., T and B will work together to mitigate an R value that is higher than either T or B alone).

3. Some perceptible level of T for the person making the offer must exist as a pre-requisite for a decision to be made.

Now let's add subjective numeric representations for the TRB elements:

0 = No perceived T, R, or B
1 = Low perceptions of T, R, or B
2 = Moderate perceptions of T, R, or B
3 = High perceptions of T, R, or B

Based on the relationship between T, R, and B, and these numeric assessments, we can create a model that explains the minimum requirements for acceptable V assessment:

$$V = (T + B) - R \geq 1 \longleftrightarrow T \geq 1$$

In English, this model says that the V assessed for an offer requires perceived T and B to be clearly greater than R, but T must exist at a minimum of low for a decision in favor of that option to occur. So if the customer doesn't trust you to deliver on time and within budget, it doesn't matter how much benefit you offer or risk you mitigate. This also doesn't mean that you'll win, only that you show enough value to be considered.

A BV decision is made by comparing the relationship between multiple value assessment and price charged:

$$BV = V \geq \$$$

The higher the numeric value of V and the lower the $ in this model, the higher the probability of the offer being selected—as long as it is within the boundaries of "customer reasonableness" or the "should-cost" model. For example, if a new Ferrari is offered for $2, it could seem like a great value; but the offer is so far outside the range of reasonableness, it signals something is wrong about the offer.

Every decision maker has a specific benefit they are looking for, a different level of trust in you as the provider, and a different degree of acceptable risk. Trying to influence a decision maker that we have the right solution without building trust and understanding their personal concepts of benefit and acceptable risk doesn't work.

SO WHAT DOES ALL THIS MEAN?

1. If you're not trusted, you can't influence!
2. Nobody buys features—customers buy BENEFIT!
3. Influence can be exerted as a result of effective trust-building and benefit discussions. ●

Dr. Larry Phillips is senior manager of capture strategy for Northrop Grumman with more than 20 years of experience in capture and business development. Dr. Phillips can be reached at + *laurence.phillips@ngc.com.*

SYSTEMATIC WINS

BD

Sorting Through the Clutter

SCORING YOUR CAPABILITIES

By Britt Bochiardy and Jim Creutz

COMPANIES PURSUING GOVERNMENT and private sector advertised business can face an overwhelming storm of potential contracting programs. The focus is often on a few well-understood, near-term programs with many other opportunities in a broader pipeline. That pipeline often uses market research and acquisition source websites, where users can define general search criteria to identify programs. This can help sharpen the focus, but truly useful results still require extensive program analyses that can consume considerable resources. This is an especially acute problem for small- to medium-sized firms, or any firm experiencing resource limitations. A better way is to use effective, non-labor-intensive scoring methodology that applies customized criteria to acquisition packages, distilling the content. This offers a faster way to identify opportunities warranting commitment of full capture/business development (BD) resources. Combined with the usual compliance matrix tools, it can help identify where the gaps exist. The approach provides stakeholders quantitative visibility and insight to pick the "winnable" opportunities.

An evaluation of where time is spent in the proposal process can provide some insight. Is needless time spent reading through program documentation, only to determine that it does not really match your company's capabilities and past performance? Are programs pursued based on the emotional desire of a stakeholder? Would reducing this tedious upfront effort increase the return on investment (ROI) for your time? Is it better to read every acquisition package or just those pre-selected for your professed capabilities?

Honestly assess your win rates and overall BD ROI. Do you generate compelling proposals in your capability areas based on an analytical assessment? There is nothing more difficult for a proposal team than building a proposal without the demonstrated past performance to support it. Adding to this difficulty is the fact that the capture team has to justify "non-wins."

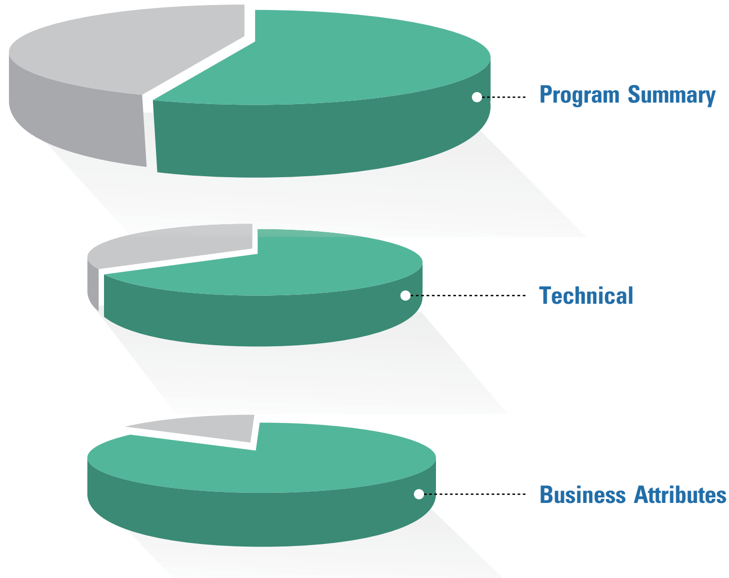
Drawing on years of experience evaluating win rates and buyer process analysis, analysts have built systems that provide automated algorithms to "pre-score" and "prioritize" programs. One automated system is described here:

The process begins with a discovery phase to capture company capability elements. Source materials might be company web content, marketing brochures, capability statements, previous proposals and their related requests for proposal, and/or sources sought/requested for information (RFIs). Other criteria may include:

- 8(a)
- SDVOSB
- WOSB
- Security issues
- Certifications, etc.
- GSA Schedules

These discovery analyses identify "indicators" that could be beneficial or, in some cases, could be detractors

Visual references allow quick view of program match.



(e.g., requirements not in your strong areas). Grouping these indicators into categories aids in visualizing the strongest capability areas. A company with multiple lines of business, each with independently unique features, can repeat the process for each business area. Combined indicator lists may also be utilized for potential team/sub relationships, applying them to task orders on large acquisition contracts.

Once criteria have accurately been determined, the basis to determine a company's "affinity" to each program has been established. With the system of success indicators set, the candidate acquisition documents are uploaded for analysis. These may come from any number of acquisition organizations.

Creating quantitative metrics for an essentially qualitative issue requires assumptions about which factors really matter. Simple counts of "buzz words" are not enough. Detailed analysis is required to determine the real affinity of capabilities to requirements. Further, as company or team experience grows, the analytical indicators should be updated.

Today's environment is forcing companies to attempt to do more with fewer resources. This lowers ROI. This approach provides a way to quickly filter out the "time-wasters" and allows better use of the market intelligence companies pay for!

The results document how your capabilities "score" against each program, provide a clearer resource allocation strategy, and indicate areas of company focus for success. Summaries can be reviewed online for quick assessment or in detailed reports. The reports allow a company to "drill down" to see how individual elements affect each category.

Implementing this inexpensive tool not only helps unclutter the target space, but it also allows companies to focus on programs that more closely fit their core strengths. This ultimately increases win rates. ●

Britt Bochiardy and **Jim Creutz** (principals of AffinityAnalytix) have more than 50 years of combined business development and program management experience. Reach them at + *jcreutz@affinityanalytix.com* and + *bbochiardy@affinityanalytix.com.*

AUGMENTED REALITY

A Corgi and a Crown

3-D PRINTING FOR THE ROYAL FAMILY

By Dave McCormack

MEMBERS OF THE British Royal family, including the Duke of York, Earl of Wessex, and Duke of Gloucester, were given a personal demonstration of 3-D printing and augmented reality technology at the Queen's Coronation Festival at Buckingham Palace.

More than 200 of Britain's best businesses—those holding a prestgious Royal Warrant for having down business with the Royal family—gathered at the esteemed event to celebrate the 60th anniversary of The Queen's Coronation. The Coronation Festival celebrated innovation, excellence, and industry, and showcased a range of fine brands, which have earned the recognition of a Royal Warrant over the years.

Across the four days of the exhibition, in the glorious sunshine and the beautiful gardens of Buckingham Palace, more than 60,000 members of the public and royal family, as well as VIPs from the world of trade and industry, marvelled at the wares on display from UK companies such as Bentley, Aquascutum, and the General Trading Company. This celebration of 3-D printing and augmented reality showcased and demonstrated that communication can be about more than 2-D images and ink on paper. The 3-D models on display included Buckingham Palace, a corgi, a crown, and even a model of TV presenter James May's head made for a TV programme.

Demonstration of augmented reality to HRH Prince Edward, Earl of Wessex by Michelle Greeff, director of 3-D and CEO Kieran O'Brien, of Hobs Reprographics

Photo courtesy of Hobs Reprographics

Augmented reality, 3-D printing, and 3-D visualization are being used to enhance the communication of key messages within proposals. AR technology can complement and enhance product previews by allowing the customer an inside view, beyond the packaging, to envision the product's details inside the packaging. AR technology simply adds information about the surrounding real world to the object to create an interactive and digitally manipulable experience. Additive manufacturing, otherwise known as 3-D printing, is the process of making a 3-D object or model from a design file—an STL file. To create a print of this nature, the printing device adds layers of substance, building the item or model from a series of cross sections. The substance used can be a powder, paper, plastic or liquid. The result is a multi-layered print—a 3-D print—that can correspond to just about any geometric shape and can accommodate the most intricate features.

The *Economist* described the growth of 3-D printing as being the next industrial revolution, and Hobs Reprographics, among others, has experienced a 400 percent uplift in 3-D print sales against targets, exceeding all expectations.

To meet rising demand, Hobs is moving to new, larger premises in the new tech city hub in Central Street, EC1, and is investing in new technologies, including a 3-D printing machine that produces resolution 3-D printing.

Commenting on the rise of 3-D printing, CEO of Hobs Reprographics, Kieran O'Brien, says "The possibilities for 3-D printing are endless, from buttons for clothing, to lampshades and whole room interiors, as well as buildings. We have just 3-D printed the awards for the UK's 2014 National TV Awards, and recently printed 3-D models of Manchester City and Manchester United football stadiums. We are seeing 3-D printing become an important part of the bidding process, to bring designs and proposals to life, across multiple industry sectors."

Royal Warrants are a mark of recognition of individuals or companies who have supplied goods or services for at least five years to the Royal Household, and have always been regarded as hallmarks of quality, excellence, and service. Hobs Reprographics was awarded its Royal Warrant in 2003. ●

Dave McCormack, AM.APMP, is manager of Team Tender for Hobs Reprographics. He can be reached at +44-207 487 1252, + *dave.mccormack@hobsrepro.com* and + *www.hobsrepro.com.*

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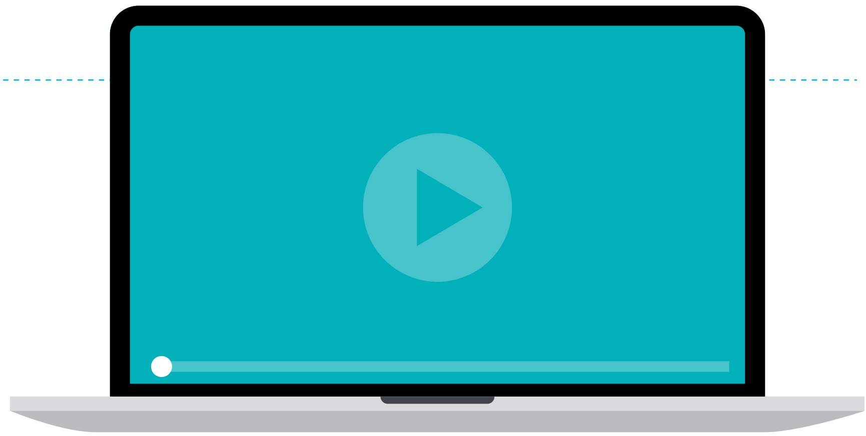
RICH MEDIA

Digital Video

AN INTRODUCTION TO YOUR NEXT HIGH-VALUE SKILL

By Tim Russell, CF APMP



AN APMP TASK FORCE is currently working with industry representatives to define how "rich media" will become an integral component of the proposals we develop. *Toward the Electronic Proposal* (*APMP Journal,* Spring/Summer 2012, pp. 18–28) detailed two certainties: 1) video, hyperlinks, and other rich media will soon become commonplace in proposals, and 2) rich media will be subject to format requirements and restrictions like text-on-paper proposals are now.

An essential skill for us, then, will be managing digital video (DV) file sizes and formats. This can be a frustrating medium without an understanding of its basic properties. This article provides an introduction to these properties.

Digital video workflow begins with a high-quality source file. If the source file does not meet the quality standard for customer submittal, you are at a stopping point. Nothing you can do with the deliverable file will improve its quality. When you have a source video of sufficient quality, you generate the deliverable file through a process known as "encoding," which encompasses these components:

ENCODER:

Software that compresses (or encodes) source video into deliverable video. Encoders do this by providing controls over the DV properties described below. Numerous encoders—ranging from free to more than $1,000—are available with a variety of capabilities.

COMPRESSION:

The two primary types of compression are lossy and lossless. As their names suggest, they either selectively eliminate or completely retain data during the encoding process. Proposal DV typically uses lossy compression to achieve manageable file sizes.

FRAME RATE:

DV is a series of still images (or frames) displayed in a sequence. Frame rate is the number of frames displayed every second—typically 25 or 30 frames per second (fps).

DURATION:

The length of DV relates to the total number of frames. As DV duration increases, so will file size.

RESOLUTION:

Each DV frame is a grid of pixels (like a digital photo). Resolution is the number of pixels on vertical and horizontal axes used to display each frame (i.e., 480 x 360 and 1280 x 720).

ASPECT RATIO:

Aspect ratio is the width-to-height ratio of the image, typically 4:3 or 16:9.

CONTAINER:

Computers store the data comprising a DV file in a container. Like the file formats we use for text-on-paper proposals (i.e., .pdf, .doc, .jpg), DV can be saved in a variety of containers (e.g., .mov, .wmv, .mp4).

CODEC:

A codec is the algorithm that translates the data stored in the container into the images and audio that compose the DV. The computer's media players know how to display DV data because of instructions provided by the codec (e.g., H. 264, VP6, MPEG-2).

Encoders allow you to adjust these DV properties by using both presets and custom settings. Presets are pre-established profiles in which the criteria for all properties are already determined. Custom settings allow you to manually input the DV

property criteria in the event that none of the presets match the output you need.

The greatest challenge in developing DV-rich media for proposals is the same challenge other DV developers face. The correlation between DV quality and file size is universal. The process of lossy compression seeks to find the optimal approach to removing data from DV files to reduce the file size, while minimizing the detrimental impact to DV quality.

Unfortunately, there is no universally correct way of approaching these properties, but as our colleagues and industry representatives begin to reach a consensus on some standards regarding rich media, we will find some replicability in the ways we approach DV for proposal development.

In the meantime, get yourself some source content and an encoder (e.g., a free demo version of Wondershare is available) and begin to practice. When the day comes that you need to embed a DV showing how your solution will provide benefit to the customer, you'll be ready.

Recommended Reading: *Real World Video Compression,* Andy Beach, Peach Pit Press, 2008 ●

Tim Russell, CF APMP, is the proposal development manager for Simpson Gumpertz and Heger Inc. (SGH), a national structural engineering and building envelope consulting firm. Russell can be reached at (781) 907-9422 or + *tjrussell@sgh.com.*

GOING VIRTUAL

Is Virtual Proposal Development Right for You?

CONSIDER THESE FACTORS BEFORE GOING VIRTUAL

By Donna Creason, CF APMP

AS THE GLOBAL community becomes increasingly integrated, it is important for businesses to consider using virtual teams for proposal development activities. Enhanced technology and a shifting business infrastructure are ushering in a larger percentage of proposal professionals who are dispersed across physical spaces, time zones, languages, and cultures.

The virtual proposal environment is not just the latest rage; it is a wide-reaching movement. And, with the right framework and processes in place, virtual proposal development can be a valuable incentive for the proposal professional and organization alike.

However, not every situation is conducive to virtual operations, and some people are not well-suited for virtual work. So before jumping recklessly into a virtual setting, it is important to identify and clarify your proposal development needs, such as:

- Clearly defining the goal of your project and listing all the possible ways for accomplishing it
- Deciding if the required expertise is available locally or if you need to look nationally or internationally
- Identifying aspects of the proposal life cycle that can be handled virtually
- Ensuring you have (or can acquire) the right tools to establish and maintain a virtual platform.

While there are many factors to consider before instituting a full-scale virtual proposal development environment, three primary factors have the greatest influence on motivating BD, capture, and proposal professionals to "go virtual":

FACTOR #1: COST SAVINGS

The leading incentive for going virtual is the potential cost savings. An organization can save between 30 to 50 percent in human capital costs by removing or reducing office space, parking, travel expenses, and benefits for full-time, on-site employees (FTEs). These are costs commonly invested in full-time, direct-hire proposal or BD staff members. And the costs of monthly or annual subscriptions for many of the required technologies is substantially less than the costs associated with FTEs—especially if the proposal team is only assembled for the time required to develop and submit the proposal.

FACTOR #2: TECHNOLOGY

Technology is the reason virtual collaboration is possible; this capability did not even exist 15 years ago. The work model

Technology Solution	URL	Instant Message	Group Chat	Project Management	File Sharing	Content Management	Teleconferencing	Virtual Meeting	Online Whiteboard	Calendar/Scheduling	CRM
5pm	www.5pmweb.com			●							
AnyMeeting	www.anymeeting.com						●	●			
Basecamp	www.basecamp.com			●							
Box	www.box.com				●	●					
Campfire	www.campfirenow.com		●								
Central Desktop	www.centraldesktop.com		●	●				●		●	
DropBox	www.dropbox.com				●	●					
Microsoft Dynamics	www.crm.dynamics.com										●
FilesAnywhere	www.filesanywhere.com				●						
Google Calendar	www.google.com/calendar									●	
Google Docs	www.docs.google.com				●	●					
Google Talk	www.support.google.com/talk/	●	●								
GoTo Meeting	www.gotomeeting.com/online/		●				●	●			
Lync	www.office.microsoft.com/en-us/lync/	●	●					●			
Pidgin	www.pidgin.im	●									
Salesforce	www.salesforce.com										●
Scriblink	www.scriblink.com								●		
Microsoft SharePoint	www.office.microsoft.com/en-us/sharepoint/			●	●	●			●		
Skype	www.skype.com	●					●				
TeamLab	www.teamlab.com			●		●				●	●
WebEx	www.webex.com						●	●			
WorkZone	www.workzone.com			●							
Yahoo! Messenger	www.messenger.yahoo.com	●	●								
Zoho Chat	www.chat.zoho.com	●	●								
Zoho CRM	www.zoho.com										●

of the last generation (9 to 5 in office cubicles) is overlapping with the work model of today's generation (flexible workday from anywhere). And technology is the catalyst that is moving all of us toward the next-generation model. The technologies shown in the table above have been developed specifically to facilitate seamless and reliable collaboration for a growing, remote workforce.

FACTOR #3: INCREASED PRODUCTIVITY

In a virtual environment, proposal professionals can be 35 to 40 percent more productive, simply due to decreased workplace distractions. When the right virtual technologies are in place, proposal teams can work effectively together without too many logistical issues—substantially improving collaboration thereby increasing individual and team productivity.

Virtual is the reality of the times; it is being driven by an emerging global economy, shifts in business structure, and enhanced technological capabilities. Moving toward virtual teams and collaboration might not be as unrealistic as it seems. We already rely on various remote service providers to manage a handful of internal business systems. Whatever you want to label this emerging way of work, it is clear that BD, capture, and proposal professionals will need to implement virtual proposal development into their overall plan, sooner than later ... even if it is just a piece of the entire pie. ●

Donna M. Creason, CF APMP, is president and CEO of Summit Publication Design, LLC, a tech-creative, design, and development company. Creason is a quality-driven communications and management professional with 20 years' experience in computer information systems, content development and management, and knowledge transfer. Visit her website at + *www.summitpubdesign.com* or email her at + *dcreason@summitpubdesign.com* for more information.

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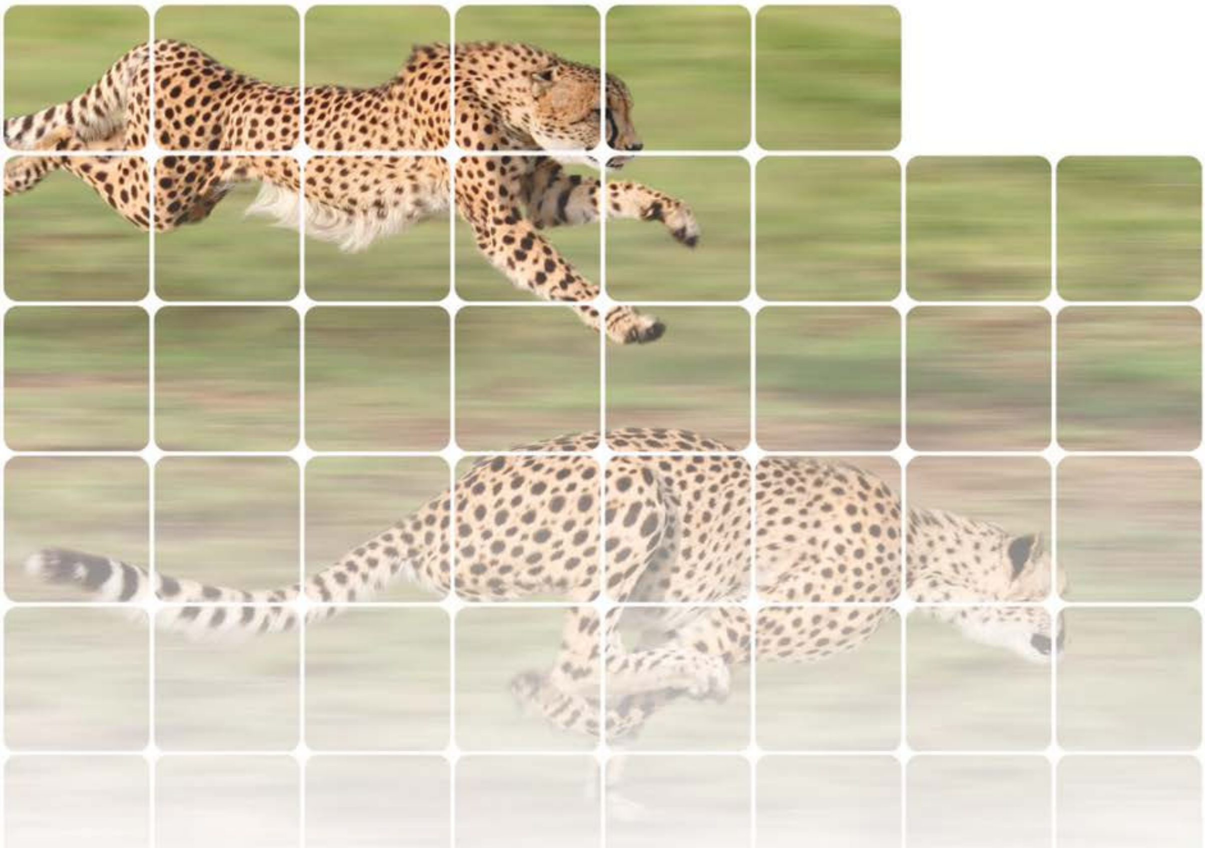

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GENERATIONS AT WORK

The New Workplace—Anywhere

MILLENNIALS AND THE FUTURE OF THE PROPOSAL PROCESS

By JoAnna Howell, CP APMP, PMP, M.B.A.

THE WORKPLACE IS CHANGING. It is estimated that by 2025, 75 percent of the workforce will be comprised of Generation Y, or the millennial generation. With this transition will come huge paradigm shifts in how business is conducted around the globe. As a group, millennials are much more flexible in their definition of a workday than previous generations. The concept of sitting in an office for eight hours or more each day is not a requirement for business in the minds of these young professionals. Millennials see a workday as something that can occur from any location, anywhere in the world, and any time of day or night. If you have Wi-Fi, you have a work environment.

What does this flexible work environment mean for the future of proposal development processes? Over the next 10 years, we will begin to see a move towards more virtual workspaces, both for our customers and ourselves. Storyboards will be entirely developed in virtual collaborative spaces instead of on the walls of your conference rooms. Color team reviews will be entirely virtual. Stand-up meetings will not require co-location; instead, each team member will log in to the conferencing program. Production times and costs will be reduced because less printing and publishing will be required. This means more time will be spent writing and preparing the document for submittal. Proposal closeout will also be expedited because reducing the production of physical copies means less paper to house and manage. Imagine your own processes. How do you think they will change as we move to an entirely digital environment without co-located teams?

Within 10 years, the concept of a physical office, with co-located teammates and costly production efforts, will be a memory. Millennials are streamlining processes and accomplishing goals, milestones, and proposal gates with increasing efficiency and reduced costs. These efforts will heighten collaboration between teammates worldwide. Processes have already begun changing. It is hard to imagine a more global environment than we have today, but that is exactly where the millennial generation is taking us—where proposals can be developed collaboratively in a global environment, without co-location or costly overhead expenses. ●

JoAnna Howell, CP APMP, PMP, M.B.A., has a decade of writing and management experience and a distinguished career of accomplishments in proposal and project management. Howell was a speaker at the 2011 APMP Annual Conference. She can be reached at 903-457-6115.

PM

BUYER BEHAVIOR

Retraining as a Buyer

LEARNING HOW TO SELL FROM A BUYER'S PERSPECTIVE

By Joanne Gillen, B Comm, MBS, PMP, FIITD, CPP APMP

To better understand the rationale behind buying decisions and public procurement policy, Joanne Gillen, CEO of Irish proposals consultancy Bid Management Services, made the ultimate sacrifice of time and decided to retrain as a certified public buyer—an Irish qualification similar to Federal Acquisition Certification in Contracting (FAC-C). *Could this be the old story of poacher turned gamekeeper? Joanne tells us that she won't be offering her services on the purchasing side any time soon, but that the procurement lessons she has learned make her a better supplier.*

HOW BETTER TO learn how to sell than to train as a buyer—a foolproof strategy, right? From learning how to undertake market research as a buyer, through writing specifications, eliciting proposals, evaluating bids, awarding contracts, and managing delivery, the entire process is logically structured and lends itself well to being a profession in its own right.

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	Define Specification	Select Supplier	Agree Contract	Ordering	Expediting	Evaluation Follow Up
Procurement Role	• Prepare specification	• Assure adequate supplier selection	• Prepare contract	• Establish order routine	• Establish expediting routine	• Vendor performance evaluation • Settling contract problems
Elements	• Functional specification • Technical changes • Bring supplier engineering knowledge	• Prequalification of suppliers • Request for quotation	• Contracting expertise • Negotiating expertise	• Develop order routines • Order handling	• Expediting • Trouble-shooting	• Vendor rating • Vendor evaluation
Documents	• Functional specification • Norm/spec. control	• Supplier selection proposal	• Contract	• Order	• Overdue list	• Vendor balanced scorecard • Vendor profile • Vendor ranking

Where in the past the acquisition function in an organization may have been referred to as "purchasing" and solely focused on acquiring goods, works, and services from suppliers, there is now a focus on strategic procurement. Viewing procurement as a strategic function in an organization takes the more holistic view that procurement encompasses both purchasing functions as well as other matters, such as supply-side market research, contract management, and vendor performance management. In recognizing this expanded function, we as suppliers can integrate our approach and streamline the process as much as possible.

The procurement process is best described with reference to a model, the most widely known of which is the Van Weele model[1], setting out the principal procurement functions as:

1. DEFINE SPECIFICATION

The first step in the procurement process is for the buyer to define the specification of the goods, works, or services. To do this, the buyer must engage with others in the organization to determine either the technical specification or the functional specification of the requirement. Traditionally, this is the only point in the procurement process where suppliers have the opportunity to interact with buyers—to supply them with product information that will help them in crafting their specifications. Best practice in specification writing requires buyers to develop clear and unambiguous requirements, which they can then use to objectively compare offers proposed by suppliers.

2. SELECT SUPPLIER

Depending on the scale of the purchase and whether the buyer is from the public or private sector, a different supplier selection process will apply. In the most comprehensive public-sector procurements, a four-step process will usually apply. First, the buyer determines the method of contracting with suppliers for this requirement. Next, the preliminary qualification of suppliers takes place, resulting in a set of short-listed suppliers who meet the prequalification criteria. Third, the buyer prepares the formal request for proposal documents, setting out the rules of the competition, as well as the specification of the goods, works, or services required. The buyer then will evaluate the bids received. Finally, the buyer will select the successful supplier according to the award criteria specified in the request for proposals.

3. AGREE CONTRACT

The buyer then provides his or her expertise to the organization in concluding a commercial contract with the chosen supplier. Again, this will vary in its complexity and comprehensiveness depending on the sector and scale of the purchase, but will include items such as the purchase price and other commercial conditions to minimize risks and determine liabilities. In negotiating such terms with buyers, suppliers should aim to strike a happy compromize between their own organizational objectives and those of the buyer.

4 & 5. ORDERING AND EXPEDITING

As part of the procurement process, it is the buyer's responsibility to develop efficient ordering routines to ensure that all orders are delivered by suppliers to the required standard and timeline. Suppliers can optimize their order fulfilment routines to match with the client's approach and minimize the requirement for active expediting work on the part of the buyer by maintaining clear and regular communications regarding the status of open orders.

6. EVALUATION AND FOLLOW UP

The final stage of the procurement process involves the buyer undertaking supplier performance evaluation activities and providing feedback to suppliers in order to develop their capabilities. As suppliers, we should engage enthusiastically in this process, learning and improving our own processes based on feedback from our professional buying clients.

To further deepen her procurement knowledge, Joanne has recently enrolled in the Chartered Institute of Purchasing and Supply (www.cips.org) *Diploma programme.* ●

Joanne Gillen, B Comm, MBS, PMP, FIITD, CPP APMP, is CEO of Bid Management Services *(+ www.bidmanagement.ie)*, a firm offering clients training and hands-on support in proposal management. Gillen is the only person in Ireland to hold the professional-level accreditation of APMP and is on a mission through Bid Management Services as Ireland's Approved Training Organization for APMP to increase the visibility and professionalism of the proposals industry in Ireland and Northern Ireland.

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1 Van Weele, A. J. (2010). *Purchasing and Supply Chain Management,* Cengage Learning, 5th revised edition, London.

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Commercial

Welcome to the World of Commercial Proposal Writing

By Jeff Botti, APR

Congratulations! You're now a commercial proposal writer.

Maybe you were thrown into it because of necessity at an organization for which you've been working. Or maybe you have sales or writing skills and earned the job without specific experience in drafting proposals. For me, it was a strong background in public relations and marketing communications, although my work with proposals was minimal.

Welcome to your new world. You're not alone. Here's a quick primer designed to get you off to a good start.

GET TO KNOW THE BUSINESS

Whether you're in a new industry or in a new role, it's common to learn on the fly. What's better is to learn the business in a systematic way. Here are a few ideas or resources:

- Take your company's or industry's basic courses that are intended to educate support staff.
- If possible, go out on sales calls with others to meet with prospects and gain a grasp on the questions they have, what's important to them, and what your company's solutions are.
- Talk to subject matter experts in your organization to better understand what they do.
- Read your industry trade magazines or conduct Internet searches on relevant topics.

JOIN IN ON CALLS OR VISITS WITH SPECIFIC PROSPECTS

It's often not possible, but hearing from prospects firsthand is ideal in helping you craft your proposal. It gives you the chance to read between the lines to discover the prospect's unrecognized or unmet needs rather than just their perceived or stated needs.

If you can't be directly involved with the prospect, supply questions to your sales executives, partners, or subject matter experts who will interact with prospects directly. Supply questions that will reveal the prospect's pain points, values, future plans, and reasons for going out to bid, for example.

PLANNING IS KEY IN DRAFTING PROPOSALS

Come to a consensus with the pursuit team on key points that will differentiate you from your competitors. It's helpful to actually chart out themes, messages, and proof points. I use different table formats that help me keep the organization logical. This will save you a lot of time in the drafting process and ensure that the team is on board—before you've begun drafting.

Lay out a timeline for completing the work and share it with the team, emphasizing deadlines. This ensures that the team knows the deadlines for each step and when their input will be needed. Given travel schedules and busy seasons, it can help ensure they plan to give the proposal appropriate attention.

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THEME	KEY MESSAGES	PROOF POINTS
It's great to win	Good proposals take hard work	• Time spent • Team effort • Planning and information required
	Resources are available through APMP	• Webcasts • Website • Journals
	Strong proposals can help you win business	• Correlation between meeting needs and winning business • Examples of proposals that won

STICK TO THE PLAN FOR CONTENT

You have a plan for completing the proposal. Don't treat that plan as busy work. Be disciplined in using it to draft the proposal. This applies to RFPs as well. Just because you are answering specific questions doesn't mean you can't sprinkle in your key messages and incorporate them boldly in your cover letter and executive summary.

In your proposal, describe your qualifications, but be sure to demonstrate how your services can help them. For example:

a. I'm writing this article because I am qualified to share helpful writing tips vs.
b. This article will help you develop proposals that are more likely to win.

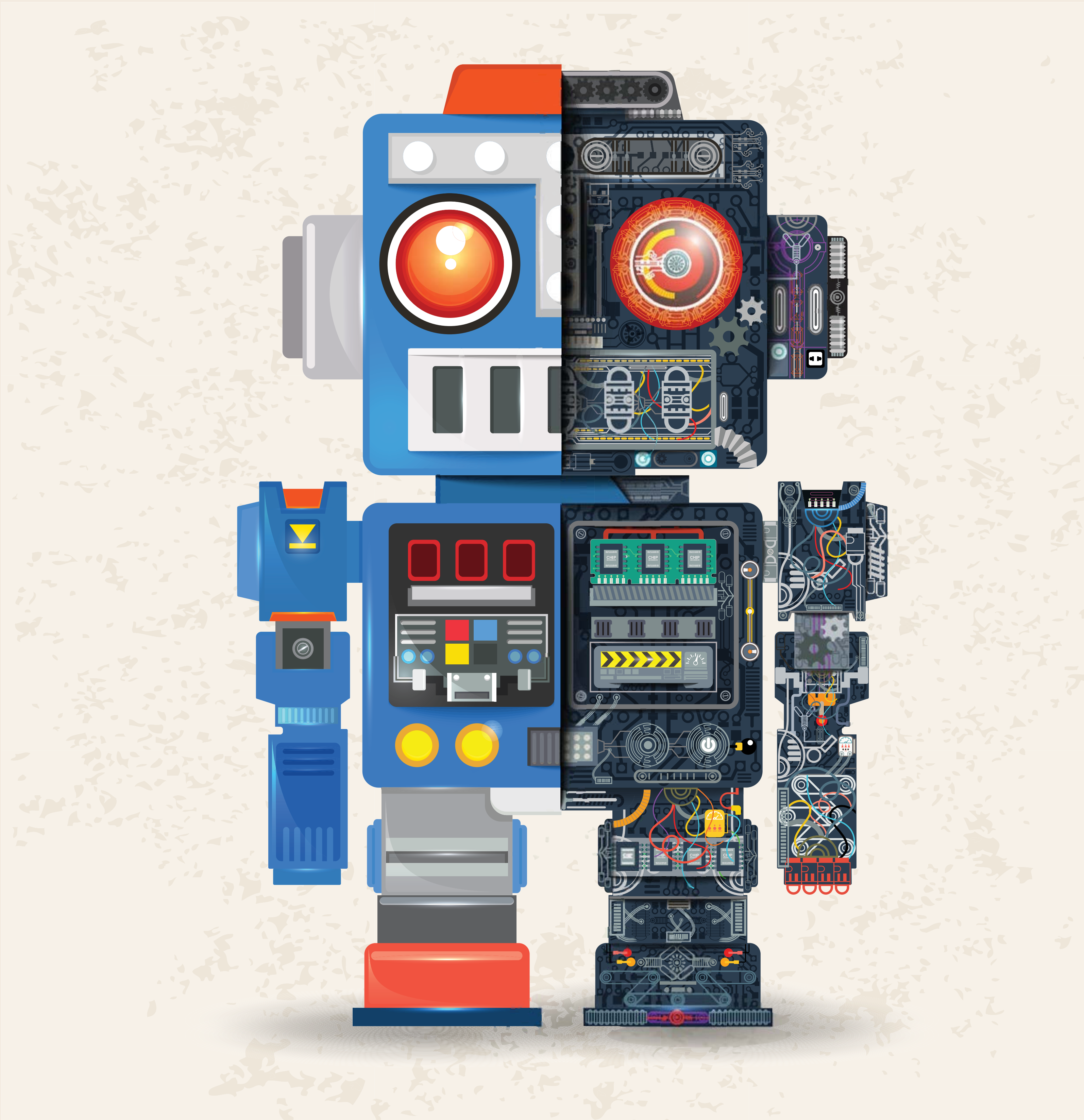
I hope the choice is obvious. (If not, go with "b.")

PROOF, PROOF, PROOF

Spellcheck is a great tool, but it's not foolproof. You should proofread your work, but also develop a network of reliable colleagues who can proof for you. Realize that as you make revisions, you are likely to make additional mistakes in your edits. Therefore, always have your final version proofed carefully.

Good luck in your new role, and don't forget that APMP is a valuable resource with many teaching tools, including webcasts, *APMP Journal* articles, networking, conferences, and more. Together, these resources can help you and your organization be winners in the bidding process. ●

Jeff Botti, APR, is a proposal writer with Plante Moran, an accounting and business advisory firm. Trained as a journalist and accredited in public relations, Botti has more than 30 years of experience in journalism, marketing communications, and public relations. He can be reached at + *jeff.botti@plantemoran.com.*



Left BRAIN Right BRAIN

Using Lean Six Sigma to Improve Proposal Management

By Peggy Dufour, CPP APMP

Effective proposal management includes a blend of skill and intuition, analytics and insight. It uses proven processes to manage outcomes and provide margin to deal with the unexpected. Often thought of as more creative and imaginative than statistics-based or analytical, in truth, proposal management involves all types of intelligence—including what's traditionally considered left-brain and right-brain thinking.

That said, many of us might have a difficult time finding a place for Lean Six Sigma in our typical proposal worlds. A set of techniques and tools originally used to remove flaws in repeatable manufacturing processes at Motorola, Six Sigma was introduced to business operations by GE with the premise that if you can eliminate even small defects, you will reap large savings as those tiny improvements are repeated millions of times in, for example, cell phone production. This concept was later coupled with lean manufacturing methods on the assembly lines of Boeing, IBM, and Whirlpool, among others, and Lean Six Sigma was born.

It's a long way from building 747s to bidding on task orders, and applying Lean Six Sigma to proposals may seem like a stretch—or even an expensive way to reach an obvious conclusion. But given the repetitive nature of task order proposals, it turns out to be an

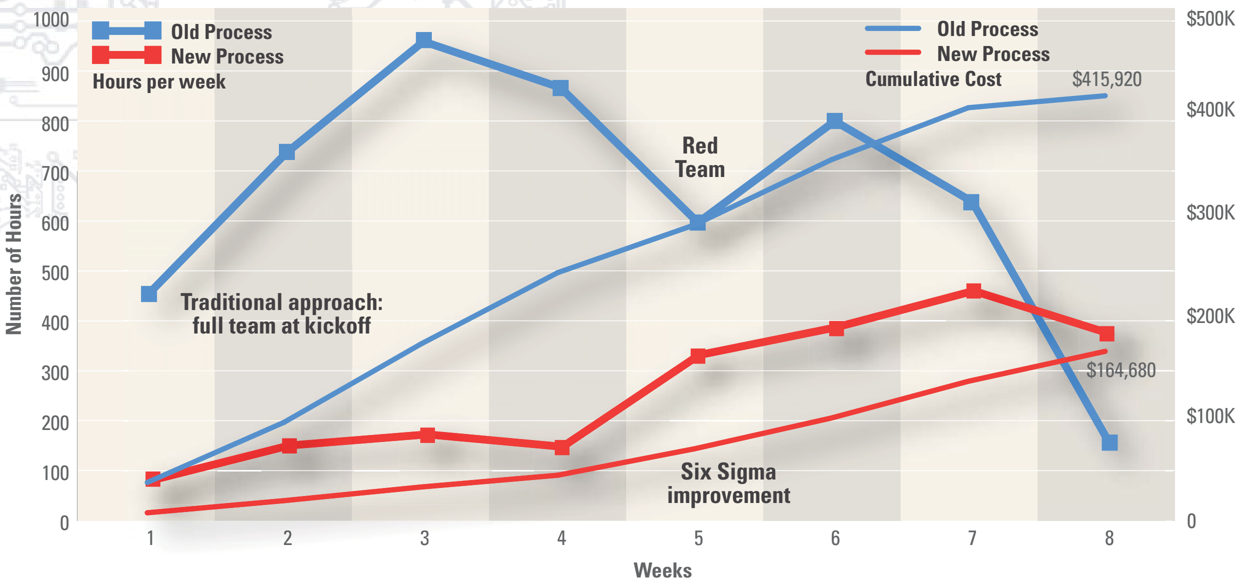


Figure 1. Two Similar U.S. Army Task Order Proposals: Cost and Hour Comparison. Six Sigma process mapping revealed that by starting with a small team to develop the technical approach vs. launching the full team at kickoff, we could save 60 percent of task order proposal hours and cost.

ideal way to evaluate activities, synchronize functions, remove conflicts, and conserve valuable human energy and bid dollars. The objective is the same as Boeing's or Motorola's—even small gains generated repeatedly can produce big results. Especially now, as government contractors need to do more with less, Lean Six Sigma's emphasis on process improvement may offer substantial and repeatable benefits.

Bechtel Corporation, the company I work for, has made a significant investment in Six Sigma and Lean Six Sigma, going back to 2001. Using process improvement projects (PIPs) to improve every aspect of our work, we have generated savings and cost avoidances totaling more than $3.15 billion for ourselves and our customers through 2012. Bechtel also has a robust and well-respected proposal process for government work that has proven successful with many federal agencies.

Several years ago, the government proposal center I manage saw a big upswing in the number of task order proposals we were producing. When proposal costs on one contract seemed out of line, the repeated nature of that contract's very similar task orders afforded an ideal opportunity to examine our process through a Lean Six Sigma lens. We had no idea what we'd find or if this analysis would even work. There was no literature on studies similar to the one we proposed, and among the 4,910 PIPs saved in Bechtel's PIP repository, ours is still the only one undertaken with the objective of examining and redesigning an entire proposal development process.

Corporate management was fully supportive of our effort, and I was fortunate to have a Lean Six Sigma Black Belt on my proposal staff to facilitate.

The outcomes exceeded our expectations. In the end, we had completely mapped our proposal process and rewritten proposal team roles. Left-brain statistics included:

- 60 percent reduction in overall hours/cost (Figure 1)
- 77 percent reduction in estimating hours/cost (Figure 2)

For the right brainers, it produced similarly strong improvements:

- Greater synergy within the proposal team because we understood each contributor's role and could help each other succeed
- Decreased internal team competition, increasing trust and leading to more creative collaboration and problem solving
- Greater availability of subject matter experts and functional personnel to be applied to billable project work or other valuable corporate tasks
- Proof that proposal centers can be places where collaboration produces solutions that actually reduce business development costs, instead of being "cost sinks," thereby facilitating more bids and potentially increasing return on investment
- Management buy-in gained by using well-respected corporate tools to form a basis for future cost and outcome comparisons.

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Note how many more words it takes to describe right-brain concepts.

The balance of this article uses APMP's STAR format to describe where we started, what we did, and outcomes that may prove useful in your proposal work.

SITUATION

We had won a contract with large engineering and construction tasks on very similar U.S. Army forts around the world. The cost of the first few task order proposals was unexpectedly high and bids were tying up corporate technical experts too long. Short proposal turnaround times were consumed by the development of complex technical approaches, which left too little time for cost volume development and generated costly overtime. With an overall goal of reducing cost, any new process also had to accommodate senior management review and approval times, be usable by other proposal centers and exportable to other business units, and fit within the company's gate review process.

TASKS

We formed a PIP team[1], defined its charter, and submitted the PIP to Bechtel's corporate Lean Six Sigma function for approval. Approval was granted, and the project was placed on the corporate PIP tracker, making success or failure visible to anyone in the company. We then trained the team in Lean Six Sigma processes and tools, established a PIP schedule, and mapped our current proposal process and subprocesses. Following that, we developed an ideal proposal process, tested elements on proposals going through our center, and reviewed the interim results. Next, we documented the revised team member roles and responsibilities and placed them on a corporate website for all Bechtel employees' use. Last, we ran a full-scale test of the new proposal process, compared results against the old process, and published our results within Bechtel's Lean Six Sigma community for peer review.

ACTIVITIES

As the Lean Six Sigma Champion candidate for this PIP, my activities included forming the team, helping write its charter, working with our Black Belt to conduct process mapping sessions and develop an ideal state, rewriting the roles and responsibilities, participating in peer reviews, getting the results validated by our Lean Six Sigma corporate function, and presenting the results to senior management. It required a large time commitment worked in between proposals and that the PIP team stay together for an entire year.

The most important PIP activity was process mapping. Facilitated by our Black Belt, we started with a blank wall of whiteboards and created two maps over many sessions. The first map showed what we currently were doing and revealed conflicts inherent in our activities. The second, a 10-foot-long flowchart, documented the revised process. Both maps included horizontal "swim lanes" that identified personnel groups such as business development, proposal center, functional team, cost team, procurement, legal, and senior management. Vertical segments marked the various stages of the proposal, and the bottom time axis indicated which members of the core proposal team participated in major activities. Across the main body of the revised process chart, we sequenced every activity by every group. Each visible box represents only the highest level action and expands electronically to reveal many subprocesses.

Because everything was presented and discussed by the full team, this exercise proved very valuable in generating a cross-team understanding of all roles and needs. The resulting consensus broke down institutional barriers, led to greater synergy and trust, enabled us to support each other better, and formed the basis for new written roles and responsibilities.

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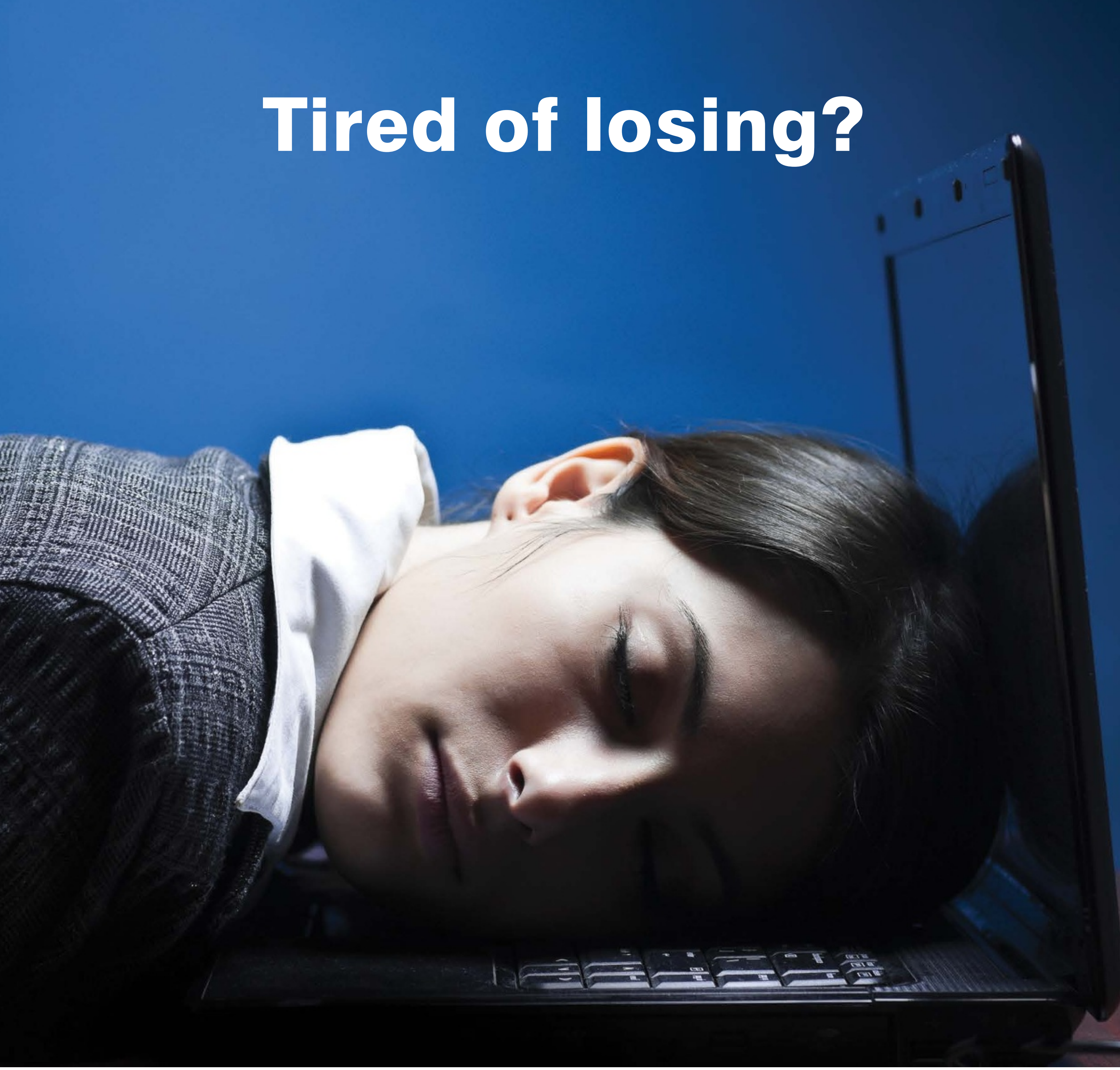
1 The PIP team comprised proposal management professionals and representatives from key functions, including business development, project management, engineering, procurement, construction, estimating, legal, and contracts, and was facilitated by a certified Lean Six Sigma Black Belt.

PROCESS/ DELTA	TOTAL PERSONNEL	HOURS					PROPOSAL COST
		Total Hours	Engin.	Const.	Estimating	Proposal Center	
Old Process	53 people	5,199	1,228	304	1,010	1,612	$415,920
New Process	30 people	2,059	694	128	237	489	$164,680
Delta	(23)	(3,140)	(534)	(176)	(773)	(1,123)	($251,240)
Delta: %	(43%)	(60%)	(43%)	(58%)	(77%)	(70%)	(60%)

Figure 2. Comparison of Personnel, Hours, and Cost Between Old and New Processes. Our revised process saved enough time and money to create an additional bid at no extra cost.



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RESULTS

We made many process changes, but one in particular—having a small team develop the technical approach before bringing in the full proposal team—produced striking benefits. Proposal costs are primarily labor costs, so it was no surprise that those two elements decreased in parallel. The real surprise was how much they decreased—60 percent overall—much more than we expected.

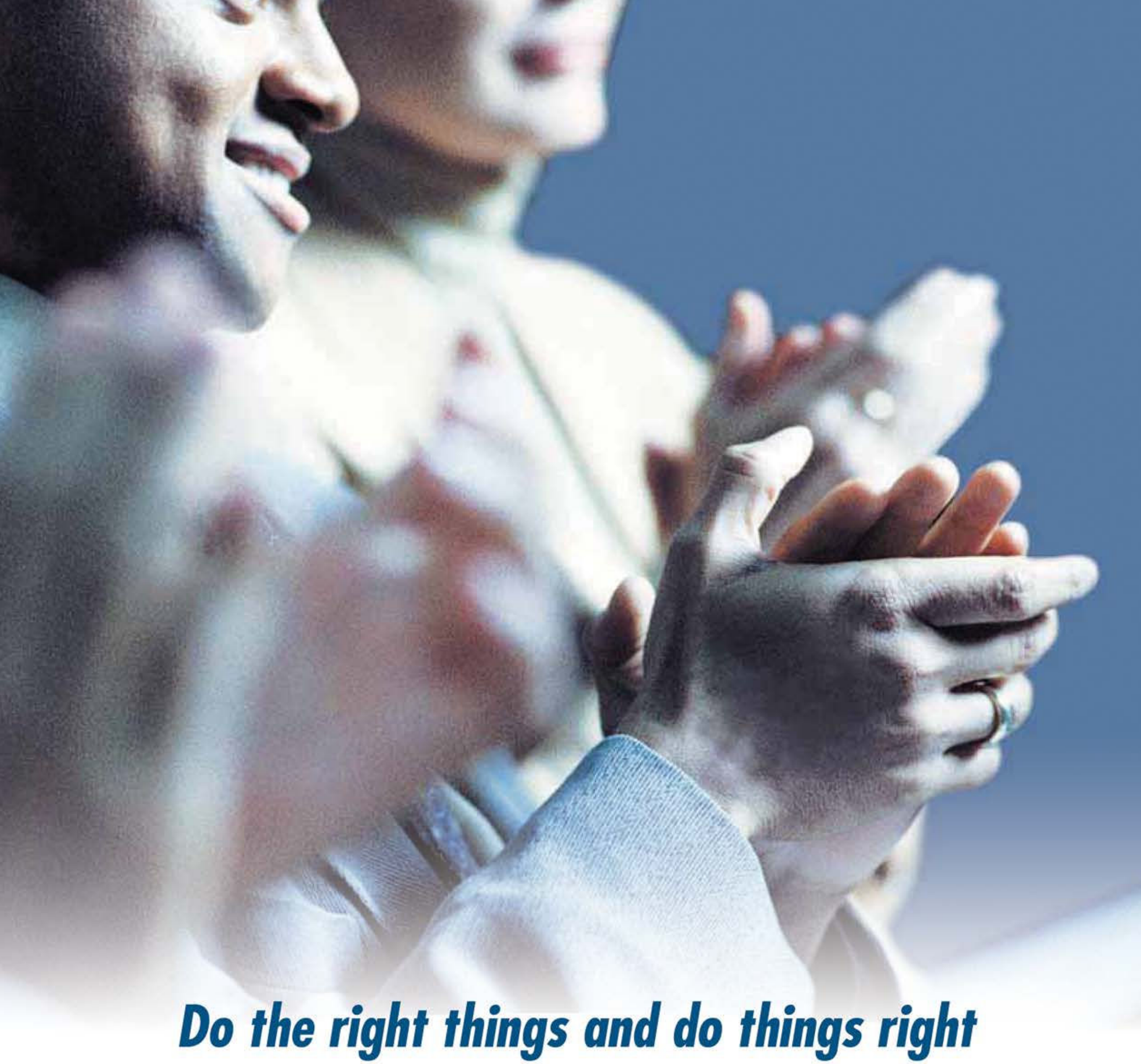
Figure 1 illustrates very different hour and cost curves, with blue representing the traditional full-team-on-board-at-kickoff approach, and red representing the revised approach, starting with a small team and building up. Advancing the technical solution allowed functional experts to focus their contributions early, freeing them for billable project work or other corporate tasks. It also increased time available in the short proposal schedule to refine content so that win themes and value propositions were clear and to ensure that cost was pared to a minimum.

The other surprise was in estimating where hours and cost were reduced by 77 percent, as shown in Figure 2. There was far less rework because solutions were largely set before the full proposal writing team was assembled. Fewer changes to the solution minimized repricing and rechecking of the estimate, which reduced overtime, fatigue, and the opportunity for human error at the end.

THE REAL SURPRISE WAS HOW MUCH PROPOSAL COSTS DECREASED—60 PERCENT. MUCH MORE THAN WE EXPECTED.

A final benefit of using Lean Six Sigma is that its methodology produces results that can be expressed in hard numbers, making them easy to understand and difficult to refute. Rather than relying on custom or intuition, you can offer concrete proof to left and right brainers, cost accountants and capture managers alike that: a) you have good reasons for the processes you use, and b) they really do work. And perhaps most important to APMP members, it provides a solid baseline against which to measure future work and continuously improve your proposal practice. ●

Peggy Dufour, CPP APMP, manages the Bechtel National, Inc., proposal center in Reston, Virginia. Dufour can be reached at 703-429-6351 or + *pdufour@bechtel.com.*



BEHIND THE CURTAIN

STEVEN JENSEN, CF APMP FELLOW,
has been providing backstage support at APMP conferences for more than 15 years

As told to ***Keith Loria***

Every year, APMP's annual conference gets bigger and better, and one of the unsung heroes is Steve Jensen, CF APMP Fellow, whose work behind the scenes has aided in its growth and smooth operation.

Jensen has served as a volunteer since 1997, evaluating each proposal for presentation, and arranging for and building out the conference curriculum. While audiences see the fruits of his labor, Jensen is a secret weapon—a member of the team who never seeks out recognition and doesn't mind his behind-the-scenes role.

After graduating from Rider University, Jensen worked as a reporter for several newspapers on the East Coast before transitioning to proposal writing and bid managing. He spent 14 years as the director of bid management for the Plano, Texas-based Acision LLC, the global market leader in the development and production of software-based voice and data messaging systems for the mobile and cable telecommunications industries. He left the position in September 2013 to spend time as an independent proposal consultant, and then accepted the position of senior proposal manager with CenturyLink Technology Solutions in November.

Recently, APMP had the chance to catch up with Jensen to talk about his long-time involvement with the organization.

APMP: You were a newspaperman for many years. How did you get involved in the proposal management business?

STEVE JENSEN: My first job working in proposals came in 1982. I was working in the marketing department for a military defense firm, and one day we got a big RFP for a military vehicle. They knew I had a journalism background, so I automatically got labeled as the guy to do it. My first response was "What's an RFP?" Soon thereafter, proposal management and I seemed to hit it off. I learned pretty quickly that I was good at it, and I was able to use the writing skills I had honed over the years and apply those to the proposal side of the house. The experience has served me well.

APMP: What was your first involvement with the APMP conference?

SJ: I joined APMP in 1987 in Florida, and there was a conference in Orlando at Disney. At the time, APMP didn't have any assigned people to run the day-to-day work; those people were usually pulled from the local chapters. I was an officer at the time and was recruited to help organize the conference. I gathered up all the presentations, did some critiques, and worked with the presenters to ensure a balanced curriculum with purpose and flow.

APMP: With the experience of that first APMP conference behind you, how did you come to continue volunteering, and how has your role expanded through the years?

SJ: After the success of my first conference, the following year APMP asked me to coordinate speaker presentations for all future conferences. I was very pleased they asked me. I have coordinated the speaker presentations for every conference since—from 1997 to 2013. For the 2014 conference, I served on the presentation selection committee.

APMP: Why did you agree to take on the position full time?

SJ: Even though it is a lot of work, I really enjoy it. It gives me an opportunity to meet people from all over the world, people I wouldn't normally get to see, and I've established a lot of good contacts and friendships as a result.

APMP: In addition to the people you meet, how else has the position helped you in your career?

SJ: Going through all the presentations, you start to learn more about your own craft and understand what the best minds are thinking in terms of proposal management and what the best techniques are. It has helped me in the way I have done my own proposals, as I have applied a lot of what I have learned from reviewing the presentations.

APMP: I know your job is changing this year, but talk a little about what your responsibilities were at the conference the past 16 years.

SJ: My role was the presentation coordinator. Any time a new conference would start, they elected a president and established a review committee of three or four people. Basically, I was the middleman between the speakers, the president, and the review committee. I was the day-to-day operational guy, making sure all the speakers had the information they needed in order to get their presentations together. A call for papers goes out, presentations come in, the review committee makes selections, and then it was my job to communicate with the speakers and answer any questions.

APMP: How has your role changed for this year's event?

SJ: I decided after last year that I was getting a little overwhelmed with work at the office and with the demands of this. I thought I might not be able to continue to do it, so I backed out. Later on, I had a change of heart, but they had moved on to coordinate in-house. They asked me if I would be on the evaluation committee instead, so that's what I am doing now. I reviewed about 130 presentations and made my critiques.

APMP: What do you enjoy about these new responsibilities?

SJ: I like having a little more input into the kinds of presentations that get in front of the membership. Hopefully, I am touching on some of the things I've learned in the last 15 years and applying that in my critiques and evaluations.

APMP: What do you consider the most important aspect of all that you have contributed over the years?

SJ: Good will. You need good will with the people who do the hard work on presentations. When you help them with developing and presenting their materials, they continue to come back and generate good material. That benefits the membership as a whole. ●

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The CLIENT-CONSULTANT *Relationship*

The role of consultants in the proposal business has been evolving, and APMP's California chapter took a look at the changes at its Training Day Symposium in October 2013. Here is just a snapshot from the detailed conversation of four leading consultants.

CONSULTANTS

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WHEN SHOULD A CUSTOMER CONSIDER USING A CONSULTANT?

GG: I think a couple of factors come into play. One is how critical the proposal is to your company. There's a level at which it doesn't make sense—$10 million? $100 million? The other is what does your internal capability look like? Do you have the internal resources to staff a proposal development effort from the perspective of a proposal manager, volume lead, and production and graphics? Third, what kind of independent view are you looking for?

EA: We want to leave residual value, so you bring in a consultant for training. You want a consultant to shadow your people, come in at various milestones, and be a "sobriety check" at key points. Training provides one of the best "bangs for the buck."

BJL: I want to underscore the objectivity piece that Gerald raised. We come in and do assessments and benchmarks. We jokingly refer to "benchmarking in the barn." Fred and Elmer have been working in the barn all day, and they're getting ready to go out. Fred asks Elmer if he smells OK, and Elmer asks Fred if he smells OK, and they both agree that they smell fine. You don't get the best assessment without objectivity.

HOW DO YOU ESTABLISH A SUCCESSFUL WORKING RELATIONSHIP BETWEEN CONSULTANT AND CLIENT?

EA: Your own leadership has to make sure the people are comfortable with the infusion of a consultant. Second, expectations need to be set. Third, have a kick-off meeting where you have all the representatives available so everyone is on board before you strike out on this.

GG: For a lot of these, honesty and transparency are the fundamental things needed on both sides. You want to be honest with yourself in terms of what you need and what you can afford, and if you don't know what you need, be honest about that. Transparency, understanding what you need, and collaboration are the keys.

MP: I want to make sure the consultant can do the best work possible and can work with the client's team. The consultant should be a head on the proposal team, not just an arm—not just, "Do what I say," but contribute. Not micro-managing. The consultant helps a great deal. My best clients allow me to do what I'm really good at.

Don't miss the full conversation at + *www.APMP.org/trainingdaysymposium.* ●