CEO Forum

What we must become

This will be my last message as CEO of APMP. For the past four years, I have been either CEO or COO, which affords me a rather unique view of what we need to do to continue our evolution as a professional association. So bear with me while I once again express some hard opinions based on experience, analysis, and stubbornness.

If I leave the membership of APMP with anything of value, it is this: We must become the professional association of choice for new business acquisition experts. Why do I say this?

One of the key things we need at APMP as a part of our long-term strategic plan is growth. Although a nonprofit organization, we are not much different from a business. Growth is good; stagnation and contraction are bad. There is not much to argue about there. Growth in membership provides additional revenue through dues and conference attendance and becomes a constant source of new ideas and leadership necessary to propel the organization to a solid place among professional associations. But our source of members among those who consider themselves exclusively proposal management professionals is a much smaller domain than that which touches the full cycle of new business acquisition activities. We must tap into these additional sources for many reasons, not the least of which is that we as proposal management professionals are dependent upon other new business acquisition professionals for significant portions of our proposal activities.

When you think about it, we are heavily dependent on marketing personnel, competitive or business intelligence professionals, capture managers, program managers, and senior executives who must make tough, competitive decisions that affect our efforts. We sometimes like to think that we are independent and we control the success or failure of our efforts as proposal management professionals. Yet we all know and we all preach the success of the capture/proposal team. Well, we are missing a large part of the winning team as representatives in APMP.

If you go back and look at your most recent *Perspective,* you will notice that I suggested changes to our mission statement and recommended that we recraft our vision to be much more inclusive than we have ever been before. Additionally, I have suggested that we adopt a Value Proposition as part of our campaign for new members and new business acquisition representatives. This proposition should focus on improved growth and competitiveness for member companies and organizations, including non-profit and Government agencies. That has to be our pitch, and there has to be value.

Recently, we developed a new brochure and purchased an APMP table top display for use at trade shows. I hope these will be useful in marketing APMP to the wider community of new business acquisition professionals and executives. The brochure was developed as part of our participation in Acquisition and Logistics Excellence Week. It is an interim product while we work on the final version. It does, however, emphasize the direction we need to go in to be successful, i.e., *"New Business Acquisition Excellence for Sustained Growth and Profit."* But there is only so much we can do to sell the organization from the top down. This is where each member can help.

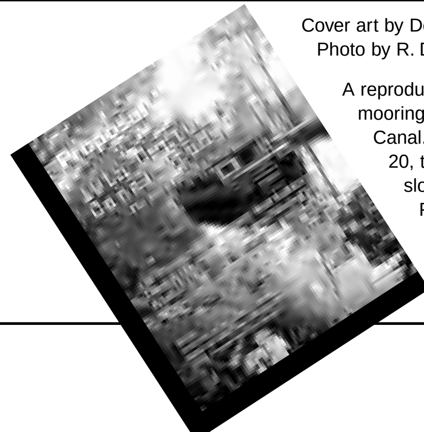
Each of us in our roles as proposal management professionals touches the other constituents we need to bring into the greater team if we are to really improve our individual, company, and industry success in new business acquisition. What we need is a committed sales force that will carry the message internally throughout our member's organizations, and that will work hard to bring these people we often depend on into our orbit.

You can make your job easier if we begin to bring into APMP those other disciplines we depend on for information and support. We will support you but we need your help. I need you to talk to your marketing personnel, capture managers, business intelligence people, and program managers about the benefits of joining the new business acquisition team as full partners. In that way, we can truly learn from all members of the team environment we build on any winning effort.

Next year, as immediate Past CEO, I will remain on the Board of Director and actively work these marketing and membership growth issues as my main job. Let me know what I can do to help you help APMP. Let's get going on the business of making APMP the association of choice for the new business acquisition professional.

In parting, I would like to add one more thing. Please remember those who perished in the events of September 11, 2001 and do your best to support what will be a long campaign to ensure the triumph of freedom. Our profession has much to give toward this effort. I am certain we will all contribute.

Proposal Management addresses



Cover art by Doron Krinetz
Photo by R. Dennis Green

A reproduction canal boat rests at its mooring on the Chesapeake & Ohio Canal. At this location, just below lock 20, the canal is cut into a Maryland slope, over 50 feet above the Potomac River's Great Falls. Ranger-led canal boat rides, in season, are powered by mule.

fall2001

The Journal of the Association of Proposal Management Professionals

IN THIS ISSUE

What's Next for *Proposal Management*

SPRING2002

Proposal Security

- **proposal production**
- **multilingual proposals**
- **protests**
- **rules for winning**

Several interesting themes are emerging for inclusion in the Spring 2002 edition of Proposal management.

First among them is **proposal security,** a long-standing concern that gets reexamined in view of both known and new, unforeseen threats. We are also working with candidate authors on pieces related to **proposal production, multilingual proposal translation, a protest case/past performance advisory,** and a dozen top rules for **winning work.**

To this, we hope to add case studies, a profile, book and product reviews, and two or three other features. Unsolicited articles are encouraged and welcome. All articles are subject to management and peer review.

Congratulations to the journal staff for their Year 2000 contributions. This Vision Award was presented at APMP's national conference in May 2001 in recognition for their contributions and outstanding work. The award was received by Managing Editor R. Dennis Green on behalf of staff members Jayme Sokolow, Rich Freeman, Linda Mitchell, Rick Rider, Roger Dean, Paul Giguere, Nancy Brome, and Doron Krinetz.

First APMP Fellows Nominated and Inducted

The class of 2001 Fellows was announced at this year's National Conference in Albuquerque.

2001 APMP Fellows

Nancy L. Cottle	CDI Technical Services	Nancy.Cottle@cdicorp.com
Eric Gregory	CACI	EGregory@caci.com
Marianne Gouveia	CDI Technical Services	Marianne.Gouveia@cdicorp.com
Steve Myers	Emergent Information Technologies	Steven.Myers@emergent-it.com
Patricia Nunn	Anteon Corporation	PNunn@anteon.com
Bill Painter	Shipley Associates	BPainter@shipleywins.com
David Pugh	Lore International Institute	Pugh@lorenet.com
Tom Sant	The Sant Corporation	TSant@santcorp.com
Steve Shipley	Shipley Associates	Shipley@shipleywins.com

To be honored as an APMP Fellow these individuals have been an APMP member for at least 5 years, and have upheld the principles and ethical standards of APMP.

Each has demonstrated extraordinary contributions to the profession of new business acquisition management. This includes contributions to new business acquisition for their companies or organizations, or through consulting practices that enhance client new business. The honor also extends to individuals that have been dedicated contributors to APMP's Professional Journal, Perspective, Strategic Initiatives or presenters at APMP conferences.

ERRATA

In the Spring 2001 edition (page 16), we incorrectly identified a publication's author. Dr. Larry Freeman is the author of the *Style Guide* originally published by Shipley Associates, now owned by Franklin-Covey. Larry Newman is the author of the new *Shipley Proposal Guide,* which was excerpted in the Spring edition.

The name of Editorial Advisory Board member Robert S. Frey was spelled incorrectly.

Welcome

From the Editor

Serious Times

How will the crisis affect our profession?

It is a serious question for serious times. As the world campaigns against terrorism, it may be too soon to know the full impact. But proposal management remains both viable and critical to the enterprise of business today.

Are jobs in jeopardy? It appears not. Anecdotally, a sampling of members, both full time and consultant, reflects little change in employment status. There is an encouraging spectrum of available jobs. All of the largest online job posting sites list a typical number of proposal management positions at this time. The positions are available with both government contracting and commercial firms. Hotjobs.com, for example, produced a listing of 21 proposal manager/writer/specialist positions among 696 matches for "proposal" in a mid-October search covering the previous 30 days. Likewise, Monster.com produced 19 titled positions among 602 matches. Dice.com produced 10 titled positions among 915 matches. Seven titled positions were listed in the APMP job bank at www.apmp.org.

Within the government contracting arena, certain procurement trends are emerging, as noted recently by Richard Rector, partner in the government contracts group of Piper Marbury Rudnick & Wolfe, in Washington, DC. In Rector's *Government Contracts Alert,* he points to a probable increase in defense spending of 10 percent or more with parallel increases in the security-related budgets of all government agencies. "Almost every government agency in the United States (federal, state and local) will have to increase security-related spending in some way to deal with the challenge of counterterrorism. Whether it is an electronic system to aid in intelligence gathering, an Information Technology solution to prevent cyber-attacks or simply additional security personnel to protect government employees and facilities, no agency can risk the *status quo* on security."

Rector predicts an increase in sole-source procurements, greater use of the Defense Production Act, changes in the security requirements of certain existing contracts, and increased travel costs. For more information, see Rector's full article under www.piperrudnick.com/publications/home.asp.

Some of the changes we find are behavioral—the same we confront in our social and personal lives. Priorities have been reordered to emphasize safety and security. In addition to our increased vigilance, the love we have for our fellows is more openly expressed. Some of these changes are good.

Dignity Prevails

Because of the lead times required to produce a professional peer review publication, the majority of this edition's articles were drafted in advance of the September 11 tragedy. That does not make them any less germane. Sherri Greer's case study in teleworking, for example, makes a compelling case for the use of this practice in the proposal management profession. We learn from *The Washington Post* that interest in telecommuting has grown since the terrorist attacks. According to the *Post's* Carrie Johnson (Oct. 7, 2001, L1), more employers are fielding requests from people interested in working from home or from the region's government-financed teleworking centers. Employees in the public and private sector can now rent a cubical or computer-equipped office space for about $25 a day in the teleworking centers.

Our profile subject, Michael Ianelli, introduces us to his successful international proposal services practice and reports that service needs in this arena continue to be strong.

Two articles focus on professional advancement. Jon Siskind offers proven recruitment and job hunting tips in his article, "Bidding the Best and the Brightest." Peter Ognibene offers timely pointers on securing work and promoting services using Web resources.

Many of our pieces deliver helpful insights and practical, step-by-step advice. In "Word Power," SM&A's Dick Eassom (one of the Spring conference's best-received speakers) shows us some tips for harnessing and understanding the powers inherent in MS Word. Dave Herndon, who contributed an article on "Using Red Teams Effectively" last fall, returns with another focus-on-basics piece, "RFP Response Mapping and Compliance Identification." Practical insights are also found in this edition's book and product reviews.

Gay Irby, a NASA mathematician with a flair for writing, gives us a behind-the-scenes look at the genesis of NASA's Internet-based procurement system—a home grown initiative which literally revolutionized government procurement at the end of the 20th century. Then Jayme Sokolow, our Assistant Managing Editor, shows a corresponding glimpse of 1800's practices relating to procurement and construction on America's canals.

Like all the journal authors before them, the ones for this edition treat their subjects with insight, respect, and dignity. Although the love of work they feel is also a prescription for happiness, it is their enduring dignity that touches us most deeply at this time.

Dennis

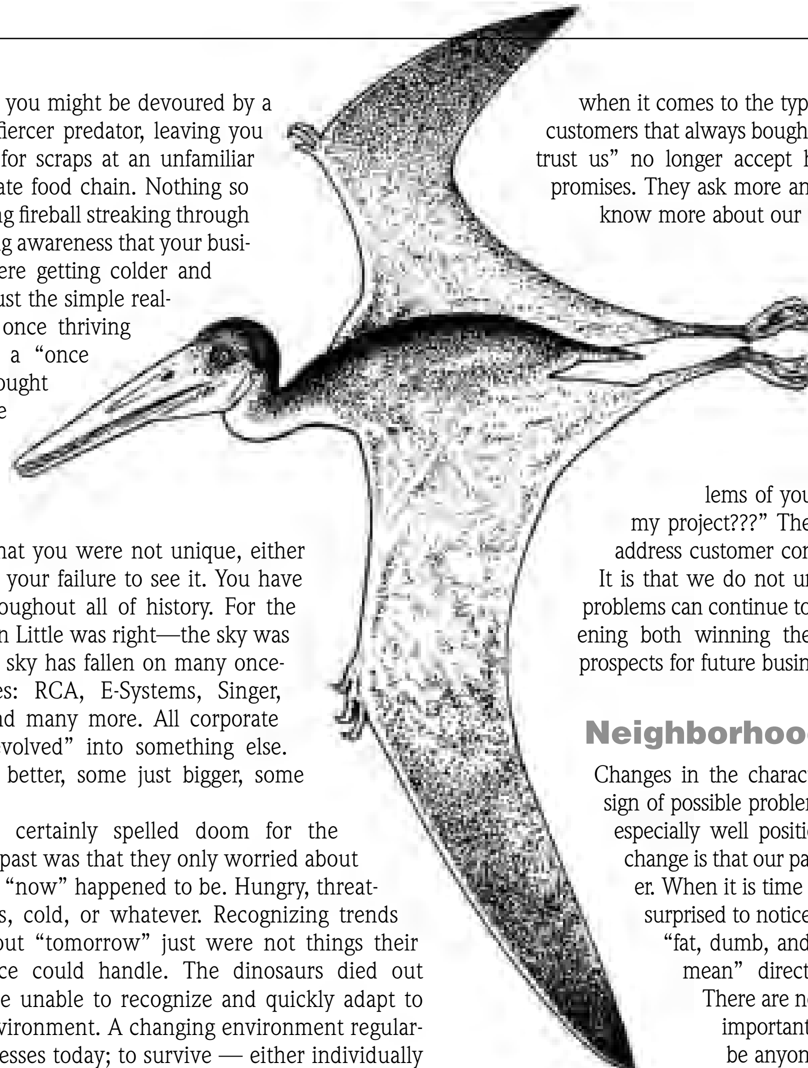
R. Dennis Green

TRENDS & VIEWS

Demise of the Dinosaurs

By ROGER DEAN

You never really saw it coming. You could have, but you didn't. It just never occurred to you to worry. You were the king, the Tyrannosaurus Rex of your industry. One day, there you were, quietly munching on smaller companies that had the audacity to try to compete with you. The next day, fate delivered you a ticket to cosmic oblivion. Extinction. Out of business — or soon to be.



Alternatively, you might be devoured by a larger and fiercer predator, leaving you to struggle for scraps at an unfamiliar end of the corporate food chain. Nothing so obvious as a flaming fireball streaking through the sky, no creeping awareness that your business "winters" were getting colder and longer. Nothing. Just the simple realization that your once thriving company is now a "once was." An afterthought on the competitive landscape of your industry.

It doesn't make it any easier to realize that you were not unique, either in your demise or your failure to see it. You have had company throughout all of history. For the dinosaurs, Chicken Little was right—the sky was falling! Today, the sky has fallen on many once-mighty companies: RCA, E-Systems, Singer, Loral, Norden, and many more. All corporate dinosaurs that "evolved" into something else. Some bigger and better, some just bigger, some just gone.

What almost certainly spelled doom for the dinosaurs of eons past was that they only worried about "now," whenever "now" happened to be. Hungry, threatened by predators, cold, or whatever. Recognizing trends and worrying about "tomorrow" just were not things their limited intelligence could handle. The dinosaurs died out because they were unable to recognize and quickly adapt to their changing environment. A changing environment regularly threatens businesses today; to survive — either individually or as a company — means that we must recognize the signs of change and adapt to them.

Signs of Change

The good news for today's denizens of the corporate jungle is that the signs of a changing environment are clear for all to see. The bad news is that they can be just as hard for us to recognize as they were for the dinosaurs; people at all levels of the corporate hierarchy miss these signs. But those of us who work proposals are in unique positions to recognize changes and make the connections that others might miss — or simply misunderstand.

From the proposal vantage point, there are at least three key indicators of the changing competition: changes in the general competitive *climate,* changes in the creatures that populate our corporate *neighborhood,* and changes in the corporate *landscape.* There are certainly many more characteristics but these three are among the most obvious and the most important to understand and adapt to.

Climate

Our customers determine the climate we compete in and the ongoing changes in our business climate should be especially obvious to any proposal professional. Customers are getting smarter and more demanding when it comes to the proposals they request. Not only are they trying to find new ways to make their task of selecting a contractor easier (even if it sometimes makes our jobs harder!), but they are also becoming more discriminating when it comes to the type of information they expect. Old customers that always bought the old story of "aren't we great, trust us" no longer accept hollow assertions and superficial promises. They ask more and better questions. They want to know more about our ability to do the work in terms of performance, quality, and delivery. Oh, and can we really do it for the price we say? Can we prove our claims of cost, schedule, and quality performance with work we have done before? No??? "And why not?" they ask. "Why won't those problems of your past continue to haunt you on my project???" The risk here is not that we cannot address customer concerns clearly and correctly once. It is that we do not understand how ignoring systemic problems can continue to hurt us in the future, thus threatening both winning the competition at hand and our prospects for future business.

Neighborhood

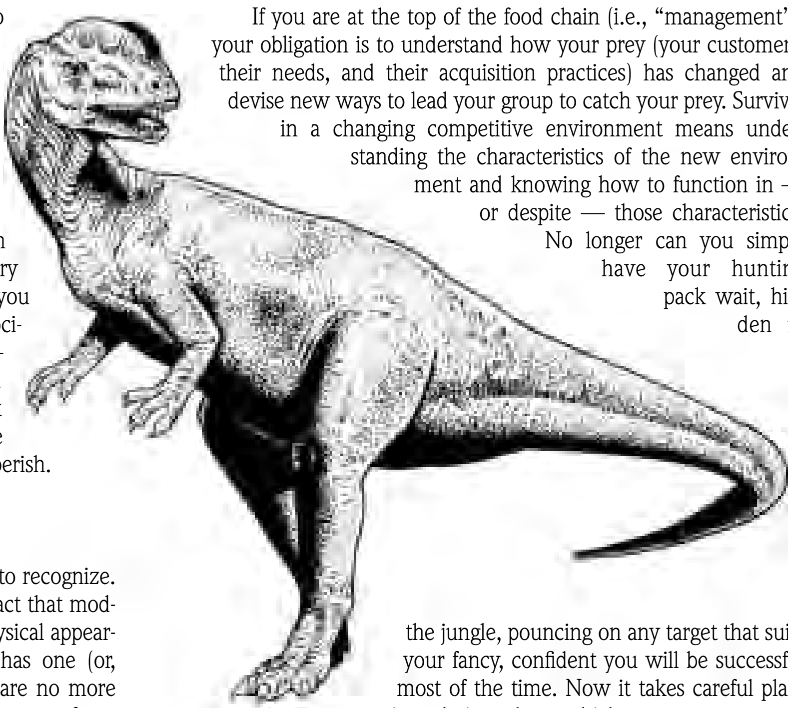
Changes in the character of neighborhood are another sign of possible problems that proposal professionals are especially well positioned to recognize. One obvious change is that our particular herds are all getting smaller. When it is time to staff a proposal, we are seldom surprised to notice that our company has gone from "fat, dumb, and happy" right through "lean and mean" directly to "emaciated and hostile." There are no longer lots of people to assign to important projects. In fact, there may not be anyone at all. Bill and Joan both retired last month. Management laid off Tony, Mark, and Nasir during the last big downsizing, and Personnel has not sent you any qualified candidates for those last three new-hire authorizations for three months. So those who are left must do more, yet still keep up with their old responsibilities. And what happens? Things slide. Some things are not done on time, others get completed but not with the same level of completeness or quality as before, and some things just do *not* get done at all. Is this all bad? Not necessarily, but even the best among us wishes that they did not feel quite so rushed, and wonder what could be missing. Are we making too many — or the wrong — compromises to save our short-term future, but wind up threatening our long-term survival?

> *"If you do not know others and do not know yourself, you will be imperiled in every single battle."* —*Sun Tzu*

The other aspect of the changing neighborhood is one that directly impacts us as professional proposal folks: the competitors. If you have enough information to know that your competitors have changed you are well ahead of the game. But what if you —

more...

company or individual — simply do not know? Too little insight into your competitors is a clear indicator that your days as dominant species may be numbered. In warfare, this is hardly a new idea. Nearly 2500 years ago, Chinese general Sun Tzu wrote, "If you do not know others and do not know yourself, you will be imperiled in every single battle." But for business, that has not always been true. Unfortunately for some, gone are the days when it was "your turn" or when you did not have to worry about an unknown or smaller competitor. Today, if you do not know the size of the teeth on that new velociraptor who just moved into your competitive neighborhood, or the ferocity of that colony of fire ants that you have been able to ignore for years, you just might find yourself in more trouble than you can handle quickly enough to do anything about it, other than perish.



Landscape

The changing landscape is the easiest change for us to recognize. Few, in or out of the proposal field, could miss the fact that modern communications capabilities have altered the physical appearance of the corporate workplace. Everyone now has one (or, sometimes, more!) computer on their desk. There are no more rows and rows of secretaries and typists. We all do more of our own "clerical" work and are expected to do it faster than ever before. In addition, the sheer ability to move massive amounts of data rapidly between people and companies means there are fewer and fewer perceived requirements to actually communicate face-to-face. But this also means that there are fewer and fewer opportunities for the spark of insight that can spring spontaneously from a session of serious brainstorming (or a heated argument), more opportunities to lose precious time through miscommunications, and myriad other compromises. All of which can lead to poorer proposals and reduced chances of winning, and better chances of extinction in the long term.

Surviving and Thriving in the New Competitive Environment

"OK," you think. "Sure, I recognize these conditions and many of them apply to me and my company. But what can I do about it? What can I do if I suspect that the bright star in the night sky is actually the first hint of a cosmic fireball on its way?" The answer is "plenty," once you get past the temptation to flee panic-stricken into the corporate jungle to hide like the dinosaurs of eons past. We have more and better options. No matter where in the food chain of your particular species you are, there are things you can do to help prevent your own personal and corporate extinction. The common key to survival with all the signs of possible impending extinction is adaptation — learn to do things differently.

The common key to survival with all the signs of possible impending extinction is adaptation.

If you are at the top of the food chain (i.e., "management"), your obligation is to understand how your prey (your customers, their needs, and their acquisition practices) has changed and devise new ways to lead your group to catch your prey. Survival in a changing competitive environment means understanding the characteristics of the new environment and knowing how to function in — or despite — those characteristics. No longer can you simply have your hunting pack wait, hidden in the jungle, pouncing on any target that suits your fancy, confident you will be successful most of the time. Now it takes careful planning, choices about which prey to pursue, and intelligent decisions about exactly how to go about the pursuit to ensure success.

But what about those of us who are further down the food chain (and that includes most of us!)? We all have similar obligations to ensure the survivability of our particular species. Regardless of whether or not management has made the tough decisions about which targets to pursue, we must learn all we can about the changing environment—the climate, the neighborhood, and the landscape—and work smarter, faster and harder, adapting to these changes, to ensure "dinner" tonight and into the future.

With our customers getting smarter and more demanding, everyone who works on proposals must know more about what "they" want so our proposals satisfy our customers' expectations, not just our own. The government's ongoing Acquisition Reform trend is perhaps the best example of where this understanding is essential to survival. Government acquisitions now tend to mirror what the commercial world has known for years: performance, by itself, is not necessarily king in the "real world." CAIV (cost as an independent variable) demands that successful contractors carefully balance cost, schedule and performance to achieve an overall optimum solution for the user, not necessarily just the best performing solution. And when you talk about balancing cost, schedule, and performance, you have to have a credible explanation of why your particular balance is the right one for your customer — that is, explain the benefits, taking all factors into consideration. Of course, this means that you will have to know more about what your customer really wants and why. And you will have to apply this new knowledge to arrive at the right proposal answer.

Another key part of acquisition reform is the growing emphasis on past performance. With previous contract history comprising up to 50 percent of many Government contracting decisions, you must realize that if you do not do well on the projects you have today, you will get fewer and fewer chances to succeed (or screw up) in the future. If you are not serious about doing well, you will get the "thanks for your proposal, but…" phone call; new, perhaps unknown, companies will get the work that you used to command. In other words, to successfully adapt to your changing environment, all members of the herd must work harder to win the business that used to come naturally.

You also must be sufficiently flexible to adapt whatever processes you have to the resources at hand.

The changes in creatures in the neighborhood — in both our own herd and competitor herds alike — are important for companies in both the government and commercial sectors. Almost all companies are smaller today than they were even a couple of years ago. Smaller companies usually mean smaller proposal teams, and smaller proposal teams mean that you have to find more efficient ways to plan, organize, and execute proposals. Sure, you have to have a proposal process, but you also must be sufficiently flexible to adapt whatever processes you have to the resources at hand. You have to be innovative and agile, even while remembering the small handful of basic principles that guide virtually all successful proposals.

But beyond the new constraints of our own herd, the changes in the competitors in our particular neighborhoods have an even greater impact on how we must adapt, and adapt quickly if we are to survive. New competitors appear all the time, and those we know from years past — especially those that have already adapted and survived — are more clever in how they compete for business. Couple this with the fact that customers are beginning to realize that any qualified bidder can probably meet their needs and it is clear that those who survive and thrive in the changing environment will be those who know the most about their competitors and understand how to use that information to establish clear, effective distinctions between themselves and their competitors. Proposal professionals at all levels need to know competitor strengths and weaknesses to speculate intelligently on what competitors might propose, learn how your competitors have performed in the past on similar contracts with similar customers, and understand what external motivations might guide their strategic and tactical decisions for any given proposal. It is only when such detailed "tactical" competitive insight is available to all members of the proposal team that you can be confident of including sufficient information in proposals to ensure prospective customers understand the differences between your offer and those of your competitors.

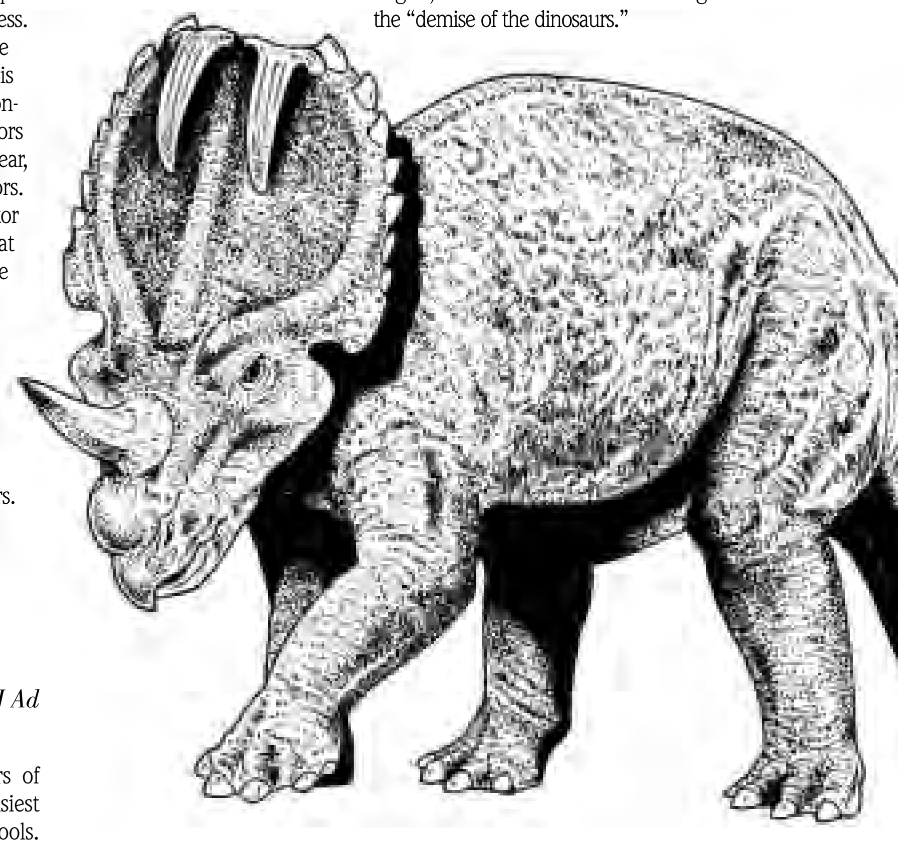
"It isn't the right tool if you don't know how to use it."

—Quoted from WSJ Ad

Adapting to the last of the three prominent indicators of change, landscape, should be the easiest since it is the easiest change to recognize. Just look around and see all the new tools. But as an old ad in the Wall Street Journal once noted, "It isn't the right tool if you don't know how to use it." So how do you survive in this new landscape: learn to use the tools. Properly. Now, before you need to use them. This means more than simply knowing how to type an e-mail or throw together a quick, clumsy viewgraph. It means taking the time to learn how to really use your word processor so that you actually help, rather than hinder, the preparation of interim and final proposal drafts. It means learning about how to create meaningful, uncluttered presentations that communicate and persuade, rather than overwhelm with technical minutia. It means acquiring and actually using some of the new collaborative software tools for timely sharing of massive amounts of data over the time and distance that separates many proposal team members today. It means learning enough about the new technology now to actually allow it to help you when you need it rather than hinder you.

A Renewed Urgency

Is any of this really different from the proposal rules of the past? Actually, no. Not at all. It is just that today, as the business environment becomes increasingly more competitive, these basic rules become much, much more important. And much more urgent to apply intelligently. With our larger brains, we can see things that the dinosaurs could not. We can recognize that change is occurring — not "has occurred" — and do something different now, not some time in the future. Companies that share the dinosaurs' myopia — failing to recognize unfavorable trends in program performance, consistently focusing on this one "must win" proposal, cutting staff to meet "the numbers" for this quarter, or whatever—could be in for some rude surprises. If we wish to be survivors, we must act to become survivors. Unless we adapt quickly to the changing environment, the problem is not that we might fail to catch dinner one night, but that we might fail to catch dinner on too many successive nights, and find ourselves succumbing to the "demise of the dinosaurs."



Roger Dean is Managing Partner of Engineered Proposals, a proposal and program management services company established in 1987. Roger and his associates help defense, industrial, and commercial organizations pursue business opportunities. Roger can be reached at RogerDean@aol.com or through the EP Web site, www.proposalhelp.com.

A Business Development Virtuoso With An International Resume

Michael J. Ianelli President and CEO, MJI Associates

By R. DENNIS GREEN

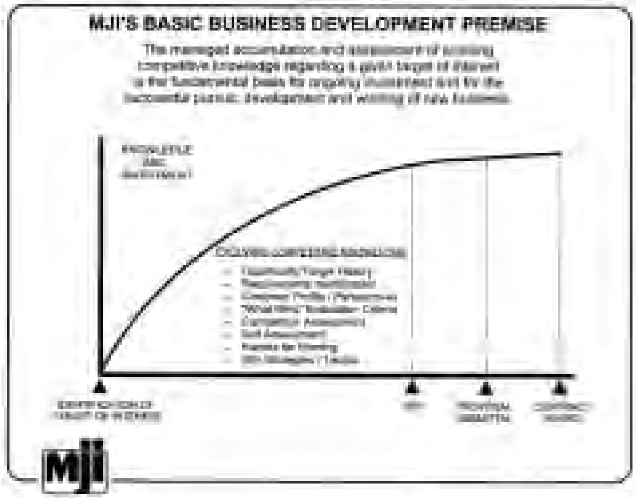
For Michael Joseph Ianelli, President and CEO of the 30-person consulting firm, MJI Associates, Inc., effective business development practices have been a lifelong mantra. Even before founding MJI in 1981—20 years ago—he had already distinguished himself as a talented business development and marketing executive with two prior companies. His enthusiasm for business development and proposals has never waned. Today he is the driving force behind the industry's third largest proposal management services firm, a US-based services provider distinguished for its international work. How that expertise evolved and the man behind it were the subjects of a recent interview when Proposal Management met Ianelli on a stopover in Washington, DC.

At age 64, the youthful looking Ianelli projects a warm compassion and sincere demeanor that puts one in mind of American singers in the era of Tony Bennett and Perry Como. That passing resemblance is reinforced when you learn that as a young man growing up in Brooklyn, Ianelli was a Sinatra-style pop singer. He sang a gospel-influenced form of rock and roll, 'doo wop,' with local bands. He was even offered a one-year singing contract in the late 1950s, though the travel it prescribed would have interfered with his other plans. He marks a chance meeting years later with Perry Como, sitting side-by-side on a flight to Florida, as one of the joys of his life.

Another obvious joy is business planning and development. He has practiced this profession over a long and distinguished career. He is a valued business visionary, strategist, marketer and advisor to an array of international business executives. He speaks with passion about the need for "upfront planning including a systemic review of the competition."

The earlier you formally get involved in this process, the more you can help to effect a win.

He illustrates this management premise in the form of a competitive analysis curve (see figure) which posits that most of a company's evolving competitive knowledge should begin to be gathered, analyzed and understood well before RFP release. This complex gathering of competitive information will be used at each gate review to decide whether or not to proceed, and if proceeding, how to optimize chances of winning. Gathering the right kind of information and synthesizing into a useable form is what sets process apart from random decision-making. He adds, predictably, that "the earlier you formally get involved in this process, the more you can help to effect a win."



This trademark Ianelli "Curve" posits that most of a company's evolving competitive knowledge should be gathered and analyzed well before receipt of the RFP.

Ianelli maintains that any company pursuing a target opportunity must establish a continuously evolving database of competitive information (including requirements). This should serve as a baseline for planning and strategizing their pursuit and for improving their chances of winning the contract. To him, this curve explains it all.

Not enough companies turn down opportunities that they cannot win.

All Ianelli's important points are punctuated with a language of hand gestures. His native language is Brooklyn English. He also speaks some Italian and French.

Ianelli specializes in helping companies grapple with whether or not to bid, and if they decide to bid, what their strategies and tactics should be. "Sometimes a client brings us in to help them with their go/no-go decision. Should we or should we not bid this job? What are the realities of this job? You know, you fool yourself after a while. Not enough companies turn down opportunities that they cannot win or that have no benefit in the long term."

Ianelli advises companies to think along the following line: "First of all, is the target compatible with your business plan? Is it winnable? Is it doable? Is it profitable? And lastly, is it affordable? If the piece of business meets this equation, only then is it worth doing."

He raises some important what-ifs. "So you win but can't do it. Or maybe it's neither financially profitable, nor does it improve your long-term positioning. Why waste resources by going after it?"

The best any proposal consulting service can do is get you to the table.

For bidders who do not keep up with their competitors, Ianelli adds this caution. "You have a lack of data, a lack of position, and you think you can overcome it with a proposal. Proposals do help, but they are not the end all. And that is a message to the people in my business. Don't go around yelling, hey, we won, we won. A lot of things went into that win, the proposal being just a part of it. It is partially the price, partially the product, and partially the company's position. It is partially the politics and partially the proposal. They all meld. That is one of the reasons I do not promote MJI's win ratio. The best any proposal consulting service can do is get you to the table. Our team can provide a responsive, relevant, compliant, communicative proposal that meets the customer's requirements and sells the offer. The rest is up to the client to ensure he has derived the best value offer."

A 40-Year Legacy

Ianelli's flair for mining new business was first demonstrated at Volt Information Sciences, Inc., where he rose to serve as Vice President of Marketing and New Business Development. He started there in

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1959 and stayed with the company for 20 years. Working with Volt in the late 1960s, Ianelli originated the company's VISION proposal development process and established specialist teams for managing and developing major proposals.

"Volt started out as a tech writing company," Ianelli explained. "We used to write engineering manuals for big systems projects: the Atlas weapon systems, radar systems, communications systems, shipboard systems. That was big, big business in New York at the time. When the defense business started to slow down in the sixties, I along with the President moved the company towards work with the Department of Labor, the Department of Housing and Urban Development, the Office of Economic Opportunity, Peace Corps and Job Corps. We used to write proposals in pursuit of this business, which is how I started to touch on what proposals were all about."

Volt's large proposal support efforts for clients were a natural evolution. "It started when Volt sent hundreds of people to Lockheed in Marietta, Georgia," said Ianelli, " to work on the proposals for the C-5" [heavy-cargo military transport plane]. More proposal support efforts were soon to come.

"One day we got a call from some people we knew in General Dynamics," he said. "We used to have operations outside General Dynamics facilities—in Dallas/Fort Worth and in San Diego. We were doing all the handbooks for the Atlas weapon system when we received word that General Dynamics was sending key people from the entire company to Groton, Connecticut to work on a major US Navy proposal." Ianelli saw an opportunity to help with the writing effort.

To house the many proposal personnel who assembled, the General Dynamics team took over what had previously been a shopping center. "They had about 200 people there, working on a proposal called FDL for the Navy—the Fast Deployment Logistics ship — using new techniques and processes that few had ever heard of before. Disciplines like systems engineering, configuration management, data management, and life cycle cost were being introduced, first through the C-5 program and now through the FDL. Eventually Volt had about 100 people to support this effort."

It was soon apparent that many members of the team were unfamiliar with these new disciplines and how to organize, manage and produce what eventually became two 30,000 plus page proposals. Recognizing the need to bring process to what was then chaos, Ianelli's efforts became more and more focused as his people supported a string of proposal requirements, including those for the Navy's Landing Helicopter Assault ship (LHA) and the Spruance Class destroyers (then designated DX). Ianelli's DX team managed the various elements of the proposal effort for Bath Shipbuilding in Bath, Maine, hosting teammates Gibbs and Cox, naval architects, and Hughes Fullerton, the combat systems integrator. It was through this connection with Hughes that Ianelli met a proposal development pioneer, Jim Tracey, co-inventor of the Sequential Thematic Organization of Publications (STOP) technique.

Through his association with Tracey and the Hughes team, Ianelli learned about the use of storyboards and storyboard reviews. Ianelli recalls the glee Tracey took in conducting those reviews "because he got a chance to tell the engineers what to do." If an engineer's offering did not satisfy Tracey's scrutiny for good content, the engineer might be subject to a withering, caustic critique—but it worked. Hughes had developed an enviable win record using STOP.

About using STOP: We've got five rubrics. The same message comes five different ways.

Among his other innovations, Tracey articulated the concept of rubric tuning in the development of STOP's 2-page modules. Quoting Tracey, Ianelli said, "We've got five rubrics. The same message comes five different ways. It comes from your headline, from your summary statement, from the body copy, from the graphic itself, and it comes from the two-part figure caption. With all five elements tuned to say the same thing, you are ensuring the evaluator absorbs your key message."

Ianelli recalls that at the time, "There was no business out there called proposal consulting. Companies tended to use job shops to obtain individual proposal specialists. When I got involved with General Dynamics and saw the on-going lack of control and process, I thought that there has got to be something that pulls it all together." His working solution combined the use of storyboards with methodologies already in use for Volt's other publications work.

"In those days, even the notion of having an outline before you begin the proposal was innovative," Ianelli told us. "I'm serious. And how about, not only an outline—but there was no such thing as a cross-reference matrix. So we put one together and introduced it into our process. We called it a RIM, for requirements interface matrix. We emphasized the strategize-to-win concept and highlighted the concept of planning and strategizing prior to writing a proposal."

Ianelli coined the term 'proposal specialist,' a person to help ferret out requirements, derive strategies/themes, and guide the use of a storyboard approach.

Soon after supporting the DX program, Ianelli out-sold a large job shop company to land another large proposal assignment—this time it was the F100 engine program with Pratt & Whitney in West Palm Beach, Florida. Begging them to hold off the competitor one day, he flew down to interview their director of procurement, sold the job, and—pressed to articulate a proposal support methodology and staffing strategy—coined the term "proposal specialist" on the spot. He convinced the customer that it should have a specialist for each of its functional groups to help ferret out requirements, derive strategies/themes, and guide the use of a storyboard approach. He promptly took an order to deliver 10 such people.

"We eventually had 150 people on that proposal," said Ianelli. "I brought people in from all over the country, interviewed them, told them what we were doing, showed them how we were doing it, and set up an on-site operation." In spite of Ianelli's positive experience with storyboards and reviews, however, their use was not an immediate hit.

To persuade both his team and the client personnel, he decided to use a storyboard and storyboard review as a preliminary design tool related to engine-bay material selection. When the exercise resulted in a cost-saving replacement of the alloys to be used, the benefits inherent in a storyboard had proven themselves to the group.

Ianelli was at Volt for 20 years and served in many operational and business development capacities including a six-year stint as Senior Vice President of Marketing and four years as Director of the company's Management Systems Division. He left Volt in 1978 and joined Butler Services Group, a 100-million dollar contract technical services company, as Senior Vice President, Marketing and Special Projects, and was promoted to Executive Vice President in 1980. But, Ianelli found himself increasingly drawn to the entrepreneurial allure of being on his own and founded MJI Associates in 1981.

International Focus Inadvertent

Today, MJI Associates is an international business development consulting company that specializes in proposals written for government contracts. Though based in Centerport (Long Island), New York, it has a reputation for preparing and submitting proposals throughout the free world. How did MJI develop this specialty?

"It happened inadvertently," said Ianelli. "We got involved internationally with the very first job."

One of MJI's first jobs grew out of an established working

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AN INTERNATIONAL PROPOSAL PERSPECTIVE

Advice from the MJI Team

Most governments in the world understand that a fair, free, open competition for defense, aerospace, and government products, projects and services will yield better value and better products. The US Government, long the leader in such systems and processes, continuously strives to improve the effectiveness of its process and in many instances serves as the baseline against which industrialized governments have structured their acquisition processes.

Today, the European Union countries, Canada, Australia and several Pacific Rim countries have evolved such processes and more countries are moving in this direction.

THE INTERNATIONAL MARKET

- The United Nations has approximately 190 member countries, but not all can be counted in the International market.
- Between 60-70 UN countries are real or potential customers for defense technology, systems and/or products - countries that enjoy positive political relations with the free world, and have need for products and services.

OVERVIEW OF THE INTERNATIONAL SCENE

- World political and economic environment changes rapidly
- US Government (DoD) budget has declined over the last 10 years
- Fewer new start development programs
- To maintain competitive viability, US companies now:
  Seek new, broader markets
  Pursue more international opportunities
  Collaborate with international companies
- Most countries recognize benefit of open competition—resulting from "best value" procurements
- Major procurement drivers focus on "affordability" and "risk"
- Many international procurement practices being revised to allow more open competition
- Role of proposal is being emphasized in most international procurements.

PROPOSING TO A FOREIGN COUNTRY

GENERAL CONSIDERATIONS

- Each country has its own unique procurement process.
- Some countries processes are documented; a few are similar to those in US.
- Most vary according to the significance of the project.
- Major differences exist between Industrial and Developing/Third World country approaches.
- EU members advertise opportunities in periodic bulletins.
- Some international procurements require pre-registration and qualification to compete.
- Most international procurements are concerned with protecting and advancing national interests.
- Some allow ongoing contact between contractor and Government customer, up to award.

SOLICITATION PROCESSES

- Most use RFT or ITT (Request for/Invitation to Tender); no standard structure followed.
- Solicitations are rarely as comprehensive as US RFPs; seldom find detailed proposal guidance or evaluation criteria.
- Proposals are not page limited.
- Most focus on Technical, Cost, and Offset responses—ILS/LCC increasing; Management "soft."
- Most minimize need to display understanding/rationale.
- All prefer clear, concise responses.

SOURCE SELECTION

- Approaches vary from defined (similar to US) to informal, politically driven decisions.
- Most are project peculiar; specific criteria or factors not provided, but relative importance may be disclosed.
- Scoring or weight factors are rarely given or used.
- Technical, cost and "economic" benefits (such as offsets or in-country work) are primary selection criteria.
- Major procurements always require significant negotiation and political involvement.
- Some procurements use Q&A approach, some are informal and often allow unofficial, post-submittal changes to offer.

PROPOSING FOR INTERNATIONAL BUSINESS

Before making a firm commitment to pursue an international opportunity, you must:

- Become familiar with the politics, the culture, and the customer.
- Know and understand the project, the competitive environment, and the procurement process.
- Have assurance that US State Department will allow export of project-related technology and/or your product.
- Develop an initial project acquisition strategy and plan.

Pre-RFT Activities

- Arrange for in-country presence well before RFT is released.
- Structure and implement plan to organize in-country contacts, establish database of information, identify "What Wins" criteria, and determine winnability.
- Define project win plan and strategies - technical approach, target pricing.
- Solidify teaming arrangement with in-country and other contractors.
- Develop proposal preparation plan: organization, locations, resources, schedules, and processes.

Proposal Preparation Activities

- Review RFT, establish detailed outline per RFT direction, determine how to project strategies and your solution/offer.
- Refine "What Wins" criteria and update related strategies.
- Reaffirm team members' program and proposal responsibilities; work in same location (in-country), if possible.
- Capitalize on ability to maintain ongoing dialogue with customer; keep asking questions and building relationships.
- Write proposal in clear, concise, simple terms. Good graphics help. Most customers not prepared to evaluate long, detailed write-ups.
- Prepare an Executive Summary (even if not requested). Rarely find restrictions on glossy material.
- Provide alternate solutions/concepts/ approaches, and weave them in during ongoing customer communications, if beneficial.

Excerpted and updated from MJI brochure titled "International Proposals."

relationship that Ianelli had formed with people at United Technologies, Pratt & Whitney. In this case, Ianelli was referred to Pratt & Whitney's ISS division, then pursuing a Saudi project for an Aircraft Maintenance Facility Master Plan. *[Proposal Management columnist Roger Dean, then working for Pratt & Whitney, made the actual call to Ianelli and claims some credit for launching Ianelli's solo career.]* Later, MJI was referred to a Canadian division going after the Canadian Patrol Frigate program. With MJI's help, Pratt & Whitney made the down-select in both cases.

Next, MJI went to work with Short Brothers in Northern Ireland, a manufacturer of small airplanes that used Pratt & Whitney engines. Short was planning to pursue a US Aircraft Program, and engaged MJI to lead them from the pre-proposal activities through final proposal. Short won, and later referred MJI to British Aerospace. Subsequent referrals—together with its performance—have kept MJI busy ever since.

Today, MJI's average scope of work is five to ten concurrent assignments, sustaining a staff of approximately 30 professionals—staff and consultants combined. About the consultants, Ianelli brags that "Most of my team doesn't work for anyone but MJI. And it's not that they are committed to exclusivity through contract. Many have been with me for over 15 years, providing a kind of consistency, a synergy, which improves our ability to perform effectively and efficiently."

Some within MJI's management team have been with the company 20 years. "The people on my management team are, first of all, my wife," says Ianelli with obvious gratitude and appreciation. Klive is MJI's executive vice president in charge of all office operations. Tony Pacilio, MJI Vice President of Business Development, and Al Roth, Vice President of Field Operations, have also been with Ianelli from the start. Complementing this team is Bob Sanzo, Vice President of Marketing .

Ianelli points out that MJI works in four ways. "We support US companies in developing US business. We help these same companies secure international opportunities. We support foreign companies bidding into the US market. And, perhaps most interestingly, we support foreign companies bidding on foreign business, often times within their own government. For example, we've recently supported British Aerospace in pursuing business with the UK MoD."

MJI teams have worked in the US, Canada, England, Scotland, France, Italy, Spain, Sweden, Northern Ireland, Russia, Germany and Australia. They have helped pursue business in these and additional countries including Switzerland, Norway, Finland, the Ukraine, Saudi Arabia, Egypt, Israel, Korea, Singapore, Malaysia, China, and Japan.

The large number of US-based companies MJI has served include Boeing, EDS, General Dynamics, General Electric, Hughes, ITT, Litton, Lockheed Martin, Lucent, McDonnell Douglas, Northrop Grumman, Orbital Sciences, Raytheon, TASC, TRW, and United Technologies. Its international clients have included Aerospatiale, BAE Systems (British Aerospace and GEC Marconi), Bombardier, CASA, Daimler-Benz, EADS, Fincantieri, Finmeccanica, Matra, Sextant Avionique, Thomson-CSF (now Thales), and many others. More than 90 percent of proposals that MJI has been engaged in have achieved the customer negotiation stage.

The company's consulting services encompass:

- New business planning and strategizing
- Opportunity and competition assessments (15-20 per year)
- Win strategy development, white paper preparation
- Proposal development, preparation and management (25-50 proposals per year)
- Oral presentations support
- Red team reviews and leadership (20-30 per year)
- Technical and management systems support
- Training programs and seminars.

English Prevails

In any discussion of international proposals, the question of multilingual capability is often raised. Ianelli maintains that English remains the business language of choice over 70 percent of the time—especially when submitting to or from NATO countries.

When translation is required, it is important to build in extra time. In one MJI proposal submitted in France, the proposal was written in English, translated into French, then back into English to verify the accuracy of the original translation. In proposals with multinational partners, multiple concurrent translations may be required. On an MJI assignment in Russia, for example, it was necessary to translate the Spanish-language

Some within Ianelli's management team have been with MJI 20 years. These include Tony Pacilio (far left), VP of Business Development, and Klive Ianelli (far right), Executive VP of Operations. Also shown standing are (L to R) Steve Spurgeon, marketing specialist, and Jim Early, management consultant.

michael j. ianelli ....at a glance

Title: President and CEO, MJI Associates, Inc.

Age: 64; shares birthday (January 25) with poet Robert Burns, Philippine President Corazon Aquino, and authors W. Somerset Maugham and Virginia Woolf.

Education: Brooklyn College and NYU.

Family: Wife, Klive (MJI Executive Vice President); four children, and 12 grandchildren.

Hobbies: Golf, spectator sports, and reading.

Interests: Music, Broadway theater and politics.

Favorite Song/Quote: "...There never seems to be enough time / To do the things you want to do ..." from Time in a Bottle, Jim Croce

Last Book Read: *Founding Brothers* by Joseph Ellis

APMP: One of the original 119 APMP charter members. Member #38.

Ianelli has been the propelling force behind MJI Associates since its founding in 1981.

RFP into Russian, English, and French several times.

Ianelli is modest about his own command of languages revealing he speaks some French and Italian. His native language, he notes with a grin, is Brooklyn English punctuated with "Italian hands."

My God, Mike, you talk more than anybody I ever met. But ... you also listen. —*per friend, Rob Ransone*

Conversation with Ianelli is effortless, never seeming to falter or wane. In this regard, he likes to relate the view of friend and former colleague Rob Ransone, who said: "My God, Mike, you talk more than anybody I ever met. But you know what, through some magical way, you also listen because you come back with the right answer."

Ianelli uses an engineering precept to explain what Rob Ransone observed: "If you're into radar at all," he said, "you know that in radar they have a T-R tube on the front end of the radar which transmits-receives, transmits-receives. It's not a constant burst," he explained. "It bursts, and then it shuts down." Obviously, Ianelli shuts down long enough to discern the key aspects of a "received transmission."

Methodology Intertwined With Strategy

As with most successful companies in the proposal services business, MJI puts a priority on serving the customer's needs and interests. "My people are told, 'the first thing you think about is what's the best thing for the customer,'" said Ianelli, "and 'what's the best thing for the individual that you're dealing with?' And that's the way that I want to operate."

Ironically, the leader behind MJI's automation initiatives is known to avoid the first-hand use of computers himself.

MJI associates follow a traditional and structured proposal development methodology they call TheSys (pronounced like the word "thesis"). It is arguably one of the first proposal processes

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ever to be automated—after early adaptation to a Compaq II computer in 1984. Today's version includes an automated requirements matrix, outline generator, and 'other competitive issues matrix' or OCIM, an MJI innovation for tracking and correlating competitive intelligence gathered through any other means. Ironically, the leader behind MJI's automation initiatives is known to avoid the first-hand use of computers himself.

"The other service providers have similar things," Ianelli notes, referring to the industry's automation tools, "and they all work." But "it's not the process or automation that makes the difference, it is the people."

Following MJI's methodology, a core team pulls and assimilates the requirements into a knowledge base, from which a baseline approach is initially conceived. That baseline is scrutinized in roundtable reviews with a focus on risk—not unlike (using government parlance) a preliminary design review. From this review evolves strategy and messages. A management message example might be to structure your organization to mirror that of your customer. Each of your messages is like a theme.

Ianelli and two associates perform a storyboard presentation review. Shown (L to R) are Mike Ianelli, Tony Pacilio, his VP of Business Development, and management consultant Jim Early.

"The focus is on strategy," Ianelli said. "Where you are, early-on, is developing a competitive assessment. And out of that competitive assessment, developing a white paper which defines your direction, the competitive situation and your strategy. So everybody brought on the proposal with their discipline is given the white paper that says here's the top-level thinking, the strategy, and the competitive situation. Now go back and make your discipline function within this criteria."

Optimism and Goals

Though Ianelli makes passing reference to grooming a successor for his position, his actions and vigor belie a strong work ethic and resistance to the notion that he would ever retire.

When the US was struck with the recent terrorist tragedy, Ianelli was temporarily grounded in Italy where he had been traveling. Asked if he thought the terrorist tragedy would hurt the international proposal market, Ianelli responded, "Not at all. I think, in general, and in the short term, there may be some directed procurements which negate the need for proposal competition." One contracting officer, for example, has talked about extending a current contract for an additional year rather than rebid—and risk a low-price replacement at this time.

It could be tougher for foreign companies to win US contracts where the need is perceived to protect certain technology.

"There will probably be an acceleration of high tech procurements related to national security," he adds. "And what could come out of this is greater international cooperation, not only in the processes used, but in equipment, common requirements, and systematic aspects. Specifically by European nations and NATO allies; it could go a long way toward more cooperative programming. At the same time, it could be tougher for foreign companies to win US contracts where the need is perceived to protect certain technology."

Whatever the changes, MJI will be ready. Over time, little by little, Ianelli has been building up his overseas practice from a base in England. By growing his resource of overseas professionals, he reduces the need to staff those jobs with Americans. Why is this important? "I sense a little bit of Europe versus US in their thinking," he said. "It's not 'fortress Europe' yet. Nor has it ever been 'fortress US.' But I sense the notion that European countries would prefer to do work with their native people." He also notes "budgets are getting tighter" at a time when the cost to fly a consultant from New York to London is equivalent to a week's billing. This positioning has helped MJI's overseas business to thrive, including involvement with the UK's Smart Procurement and new Private Finance Initiatives (PFI) programs where previously purchased items—including defense hardware—are not being purchased, but leased. "The government is privatizing wherever it can."

So where does MJI go from here? Ianelli voices a lofty ambition.

"We want to be a benchmark company in our segment of the consulting business," he said. For him, being a benchmark company has nothing to do with being big. Rather, it is about "imparting the best in customer satisfaction, performance, process, value, flexibility and residual benefit, even beyond the given assignment." In marking some steps already taken, he points to the absence of personnel problems, a remarkable record of repeat business and referrals (even following unsuccessful efforts), and market share growth in the absence of any formal advertising to date.

He loves business development, and it clearly shows.

R. Dennis Green is a management consultant, writer and proposal practitioner with 20 years experience. He is Managing Editor of Proposal Management and was founder and first president of APMP's National Capital Area chapter. Email: RDenGreen@aol.com

The Electronic Procurement Revolution

Article

How Personal Initiative and Innovation at NASA Became the Electronic Procurement Model for the Federal World Wide Web.

By GAY T. IRBY

NASA revolutionized federal acquisition service on the Internet. It was created and continues to be run and managed by a small group of employees from each NASA center. NAIS is a shining example of cooperative spirit and innovative problem-solving. Gay Irby explains its history and development.

Introduction

The NASA Acquisition Internet Service (NAIS), initiated in 1994, revolutionized the way business is conducted both at NASA and throughout the entire federal government. By offering a Web-based Internet service for publicizing contracting opportunities to industry, the NAIS provides immediate, around-the-clock, on-line access to a host of acquisition information.

The NAIS was the first agency-wide implementation of a federal acquisition service on the Internet. It currently provides on-line access to all competitive NASA business opportunities over $25,000 and many below $25,000, totaling several hundred actions annually. It enables the identification and downloading of advance and post-award procurement notices (synopses), solicitations, and other related documents (e.g., drafts, amendments, attachments, specifications, questions and answers). Other features include an acquisition search engine, an e-mail notification system, access to information concerning active NASA contracts, an on-line procurement reference library, and access to NASA's acquisition forecast.

One of the most remarkable things about the NAIS is that it was created and continues to be run and managed by a small group of employees from each NASA center. Most of these employees support the effort part-time; each has a full set of duties and responsibilities outside the NAIS effort. All centers provide procurement representatives; some centers additionally provide technical support to the group. The success of the NAIS is directly attributable to this team's dedication. The team is a shining example of cooperative spirit and innovative problem-solving within the public sector. Its history and development efforts reflect the initiative and inventiveness inherent in the group:

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History

Prior to NAIS implementation, two options were available for vendors to solicit business opportunities with NASA. First, prospective vendors had the option of contacting each NASA Center to identify the appropriate NASA representatives from whom to obtain acquisition information. With ten NASA centers, this was an extremely labor-intensive task. As an alternative, vendors could search through hundreds of pages in the *Commerce Business Daily (CBD).* This was an equally daunting task, especially for small businesses.

The roots of NASA's efforts to streamline the acquisition process began with a presidential memorandum on October 26, 1993, "Streamlining Procurement Through Electronic Commerce." The memorandum challenged federal agencies to move aggressively toward a wide implementation of electronic commerce, leaving behind costly paper-based processes and embracing "paperless" electronic services.

The roots of NASA's efforts to streamline the acquisition process began with a presidential memorandum on October 26, 1993, "Streamlining Procurement Through Electronic Commerce." The memorandum challenged federal agencies to move aggressively toward a wide implementation of electronic commerce, leaving behind costly paper-based processes and embracing "paperless" electronic services.

In concert with the President's EC objectives, NASA's Associate Administrator for Procurement established a Midrange Pilot Program in 1993. The purpose of the midrange program was to simplify smaller dollar value contracts and to establish a new set of processes and tools to streamline the acquisition process. The midrange category of contracts falls between the simplified acquisition upper threshold and the lower threshold of large, complex contracts; original midrange thresholds were $25,000 and $500,000. Since the vast majority of the Agency's contract acquisitions fall within these midrange dollar values, streamlining this range of acquisitions would greatly benefit the Agency. Among the several innovative streamlining concepts proposed by Don Bush, NASA's Deputy Assistant Administrator for Procurement, was the electronic exchange of relevant information between NASA and its prospective offerors, including electronic dissemination of synopses and solicitations. An Agency-wide team was established to support the Midrange activities.

Jim Bradford, Team Lead, and Michael Lalla were the first NAIS team members.

The initial challenge in establishing an electronic transmission process for the Midrange pilot was to formalize a standard approach for doing business across a highly decentralized, geographically-dispersed organization. Conventional wisdom held that the most viable method of implementing the electronic transmission process was through the use of a dial-up "bulletin board" along with possible use of Electronic Data Interchange (EDI). Thomas L. Deback, a Procurement Analyst in the NASA Headquarters Office of Procurement, remembers how easily one of these now obsolete technologies could have been chosen:

"Our initial efforts to develop a 'bulletin board' involved looking at a number of systems utilizing Value Added Networks. While these systems showed promise to a greater or lesser degree, none were impressive enough to make us select a system and actively pursue it. We were not in a hurry to make a decision because we had not received Congressional approval to waive publication in the Commerce Business Daily, which we thought was the key to the success of an electronic system. Toward the end of this research, which was done primarily by the Marshall Space Flight Center (MSFC), the MSFC Procurement Officer stopped by while visiting Headquarters and expressed his dissatisfaction with our not having selected an electronic solution to pursue. He pushed me very hard to make a decision and move on. I shared his frustration and came very close to picking a solution to pursue. Luckily, I didn't."

Employees in the Procurement Office at MSFC continued to pursue solutions for the electronic transmission process. The

Evolution of NASA Web-Based Procurement

- 1994—Federal Acquisition Jumpstation
- 1995—Business Opportunities Portal
- 1995—Synopsis Search Engine
- 1996—Regulation Search Engine
- 1997—Electronic Posting System (EPS)
- 1997—NAIS E-mail Notification System (NENS)
- 1997—Web-based Access to the Financial and Contractual Status (FACS) System
- 1998—Consolidated Contracting Initiative (CCI)
- 1999—Request For Quote System (RFQS)
- 1999—Virtual Procurement Office (VPO)
- 2000—Past Performance Database (PPDB) System
- 2001—Interim Document Generation System (IDGS)

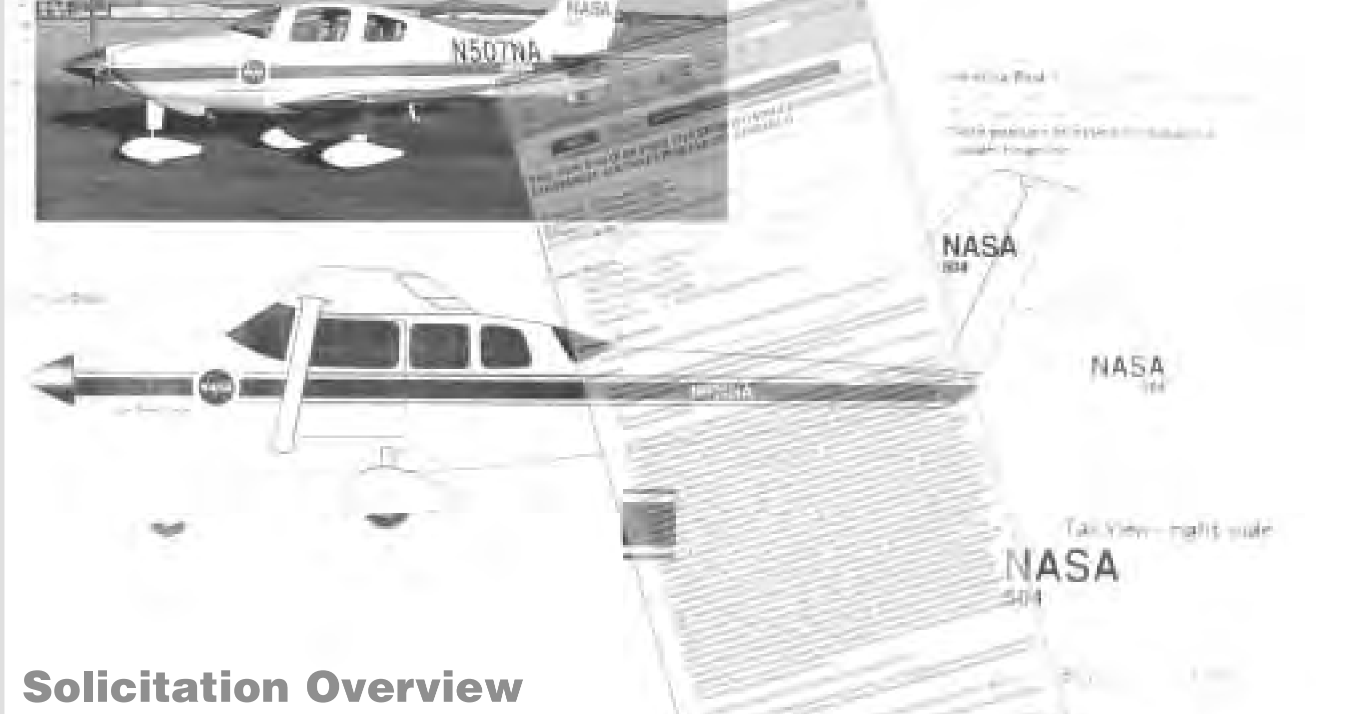
Example Web-Based Solicitation (For Two Aircraft)

Delivered Product

Sample Solicitation Documents

NASA 504 Painting Guide

Side Detail - left side (right side similar)



Solicitation Overview

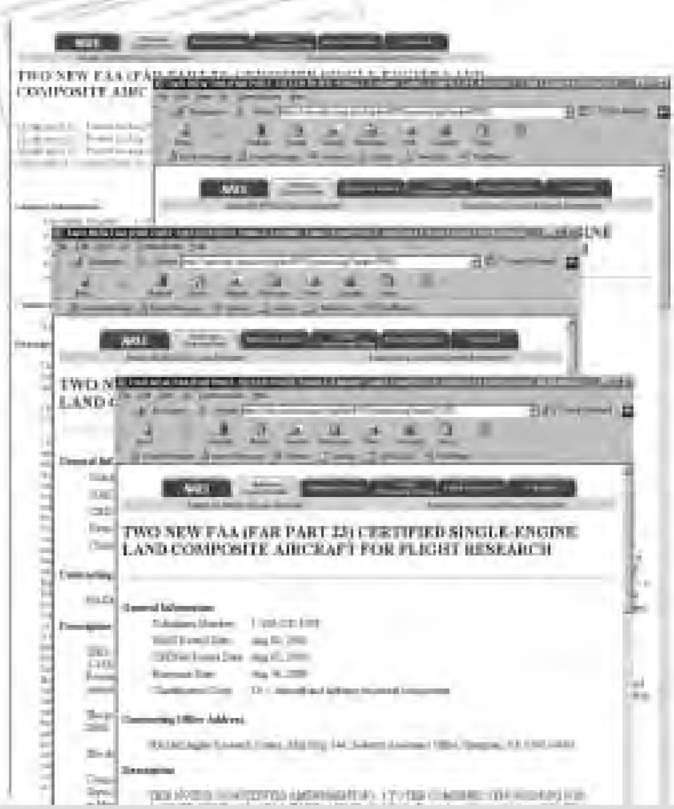
In the summer of 2000, NASA's Langley Research Center used the Web to solicit two aircraft to research test flight deck design and integration and flight controls. The solicitation was posted to NAIS on August 1, 2000, followed by three modifications and one extension. The award was made on September 27 and the aircraft were delivered January 18, 2001.

How the Procurement System Works

The NAIS Web-based procurement model has slashed procurement lead-times by 40 percent. The system generates on-line information directly onto NAIS Internet servers. In this example the original solicitation files along with detailed specifications and three modifications were posted within minutes of approval for release. Prospective offerors accessed the solicitation. They accessed it immediately, rather than waiting over a week for a paper copy by mail. Offerors copied and pasted information directly from the solicitation files, saving them hours of proposal development time.

Benefits to Contractors (Partial)

- Eliminates paper documents
- Reduces time to identify opportunities
- Eliminates query handling expenses
- Reduces time to identify applicable regulations and other documentation



search continued as NASA visited other agencies and organizations experienced in the electronic transmission of business information. Whether it was sheer luck or a situation of being in the right place at the right time, the group became aware of the fledgling Web methodology. Jim Bradford, NAIS Team Lead, recalls this first exposure to the Internet in early 1994:

"The MSFC lead for Midrange scheduled a meeting with the technical community at the center to provide the scientists with an overview of the Midrange Pilot. One of the engineers who attended the meeting was intrigued by comments that Midrange had as an objective an electronic transmission capability for disseminating solicitations to prospective offerors. When the engineer, Dan O'Neil, asked about the particular solution to be utilized, he was referred to me. Dan contacted me to ask if I was familiar with the World Wide Web, to which I indicated no knowledge whatsoever. After Dan described the Web, Michael Lalla and I decided to check it out. Dan gave us a quick demo of the Web from his desktop using the Mosaic browser. We were immediately sold on the new technology. Over the next several weeks we sought lots of help to get Mosaic installed on our desktops, and then we began 'surfing' the Internet. At this point, we turned toward an Internet solution and decided to quit pursuing an EDI approach."

First Steps

With the technology solution selected, the team started a more intense research effort to learn more about the Internet in general and the Web methodology. Two procurement professionals at MSFC taught themselves the basics of html and began the design and construction of a Web site. By the beginning of July 1994, NASA's first instance of a procurement site on the Internet was in production, making a limited number of business opportunities available to the vendor community.

Having recognized the success of the technical approach, the Midrange team began to tackle the issue of deploying Agency-wide. The intent was to develop a methodology where all centers would post all midrange business opportunities to the Web and to establish a deadline for all centers to begin this midrange posting activity. Corinne Reed-Miller, a team representative from the Goddard Space Flight Center, recalls her early involvement:

"I was assigned to the Midrange team in December 1994 and had to come up with a way to post Midrange synopses before our conference at the end of January. With less than a month, I couldn't figure out an automated way to post just Midrange synopses, excluding non-midrange, and we didn't have the resources to post the synopses manually. So, at the January conference, I stood up and said, 'We at Goddard have decided to post ALL of our synopses, not just Midrange. We feel that the business community will want to see all of our business opportunities.' Then I held my breath…A light bulb seemed to go on in everyone's head."

The team had a new goal—all business opportunities—not just midrange.

Deployment Across the Agency

The spring of 1995 brought a flurry of activity. Technical members of the team were working furiously to set up Web sites at their respective centers to support the posting of procurement opportunities. Practically none of the center technical representatives were familiar with Web methodology and the hypertext markup language (html) used to create Web pages. Since this was an unfunded project staffed by volunteers, the team members resorted to teaching themselves html in their spare time and begging for Web servers. By April 1995, all of the NASA centers had started posting some Midrange procurements. The team had the distinction of establishing the first Agency-wide implementation of Internet services for acquisitions in the federal government.

Although the initial accomplishment was posting Midrange opportunities, the centers saw the main goal as posting all business opportunities. In quick succession, the team expanded the information available online to the vendor community. By September 1995, NASA procurement offices were posting on the Internet all competitive acquisitions over $25,000, including the multi-million dollar major procurements.

"I was assigned to the Midrange team in December 1994 and had to come up with a way to post Midrange synopses before our conference at the end of January. With less than a month, I couldn't figure out an automated way to post just Midrange synopses, excluding non-midrange, and we didn't have the resources to post the synopses manually. So, at the January conference, I stood up and said, 'We at Goddard have decided to post ALL of our synopses, not just Midrange. We feel that the business community will want to see all of our business opportunities.' Then I held my breath…A light bulb seemed to go on in everyone's head."—Corinne Reed-Miller

The work of the team began to receive attention across the federal government. In recognition of this fact, a decision was made to name the service. The NASA Acquisition Internet Service (NAIS) was born.

At the same time, NASA began exercising its statutory waiver of posting business opportunities in the Commerce Business Daily (CBD). NASA discontinued advertising procurements between $25,000 and $500,000 in the CBD; relying instead solely on its Internet postings. The Agency also discontinued adherence to minimum waiting periods associated with publishing in the CBD, which proved to shave a significant amount from procurement lead-times. Synopsis generation and publishing times, for example, were reduced from a minimum 26 days to as little as a single day. Corresponding proposal preparation and turnaround times were cut in half, from 30 to 15 days.

Solving the Posting Problem

When the NAIS was implemented Agency-wide in 1995, each NASA center operated its own Internet posting process. Each buying activity prepared its advance notices and solicitations through processes established prior to the NAIS. Some centers used word processors while others used some form of automated document generation system. The completed files were then provided to a Web curator, who posted them on an Internet server and manually updated a readable index of those files. The various processes employed among ten centers made it difficult to maintain a standard look and feel to present to the industry community. Michael Lalla, one of the first two original NAIS Team members, remembers the difficulty:

"After getting all Centers onboard it was evident that numerous resources were being spent by having each Center create and maintain their own Web sites. The original NAIS Team concept had grown to a stage where additional technical expertise was needed. In order to consolidate and automate the NASA Center's Procurement Web sites we solicited the help of two engineers from the Dryden Flight Research Center (DFRC) who had dabbled in adding programming [code] into Web pages. Rob Binkley and Stephen Hoang joined our team. These two later performed the work that became the foundation of the NAIS programming architecture."

Consolidation and automation of the center procurement sites required that business processes be standardized across ten somewhat autonomous centers and the Agency implemented a business-process-reengineering exercise. The team faced the problem of reaching consensus on the methods and the mechanics of the posting process. This was the first major test of consensus building that became key to the success of the NAIS team. Corinne Reed-Miller recalls the process:

Corinne Reed-Miller—Goddard Space Flight Center Maryland

"A turning point was the technical conference held at Ames Research Center in May of 1996. Centers were presenting different methods of posting and trying to decide not only which to use as a basis for a NASA-wide system, but also where the NASA-wide system started. Although many of us were strapped for resources, there was still the center-control issue. Some centers were arguing for retaining local systems that would feed the NASA-wide system. Since only a subset of centers was at the meeting and those centers had better resources to maintain center unique systems, we were in real danger of making the wrong decision. But the NAIS teamwork had already started its magic, and we came out of the conference agreeing to use the approach offered by DFRC. We also agreed that the NASA-wide system would start at creation of synopsis."

The DFRC technical representatives began looking at the technology available to develop an automated system for the Agency. Stephen Hoang remembers how the development effort began:

"The early solutions we explored required us to purchase expensive software to be used on the server as well as on the users desktops. For a project operating on a shoestring, this approach just was not feasible. I heard about a programming language called Perl that was not very well known except in some scientific arenas. Since Perl was distributed at no cost, I began reading about the language hoping that it had features that would help our development project. One night while lying in bed struggling with technical issues, I had an epiphany. There was no need to spend large sums of money on software. Perl could be used to develop the required server software. Free browser software such as Mosaic had all the required capabilities for the users desktops. The next morning, I talked with Rob and we began a serious design effort.

"The early solutions we explored required us to purchase expensive software to be used on the server as well as on the users desktops. For a project operating on a shoestring, this approach just was not feasible. *—Corinne Reed-Miller*

DFRC started designing and developing a Web-enabled tool to facilitate the preparation and posting of advance and post-award procurement notices and the uploading of solicitations. Stephen Hoang also recalls the circumstances surrounding use of this early software:

"Some of the software tools we were using were very new and still extremely "buggy." I remember that at one point I was having a great deal of trouble with one of the cgi libraries we were trying (unsuccessfully) to use. After exhausting all of my knowledge, I contacted the author of the library for help. He offered to look at our problem, so I created an account for him on our system. He logged on to our box and completed some 'custom' debugging for us. This would be totally impossible in the security-conscious environment we have today."

The final product of the DFRC development effort, the Electronic Posting System (EPS), became the backbone of the NAIS core functionality. EPS gave NASA procurement professionals the ability to post business opportunities directly onto the NAIS, bypassing the Web curators. EPS enabled the "single-face" presentation of NASA opportunities for the first time and opened the door to a wealth of other value-added capabilities.

Team Building

In addition to the fact that the NAIS changed the way that NASA does business, a truly remarkable thing is that it was developed by a small group of employees from each NASA Center. Most of these employees work only part-time on NAIS activities. Often developers programmed NAIS code at night and weekends at home. There were multiple occasions when team members came

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in on weekends to perform final testing of new implementations. By performing testing after hours, the team avoided interruptions to normal operations. In the more typical systems environment, resources for software testing would be made available through the project budget. The NAIS program did not possess such privileges and instead relied on extraordinary efforts of its team members. This commitment demonstrates that they recognize a personal connection to the goals of the development effort.

Working together and sharing a vision, the team has avoided self-serving agendas and turf war issues. Its members must continually resist the natural tendency to work from a bias toward their home center's perspective, and consciously aim for standard, Agency-wide objectives. Its team building success is based on a handful of guiding principles *(See How NASA Defines Team Building.)*

The Associate Administrator for Procurement provides a unifying vision, and the NAIS team fulfills this vision through a grass-roots approach in establishing its mission objectives and strategy. Pioneering a new way of interacting, employing some revolutionary techniques, and avoiding a top-down, authoritarian methodology, have all protected the team against territorial bureaucracies. The team's decision-making process operates around consensus building, and in the few instances where total team consensus is not obtained, the rule of a simple majority, in which all centers have an equal vote, is employed.

How NASA Defines Team Building

Common Vision
Associate Administrator for Procurement provides the vision. NAIS team employs a "grass roots" approach in establishing its mission objectives and strategy.

Permission and Protection
Pioneering a new way of interacting, employing some revolutionary techniques, and avoiding a top-down, authoritarian methodology, have protected the team against territorial bureaucracies.

Emphasis on Consensus
The team's decision-making process operates around consensus building, and in the few instances where total team consensus is not obtained, a simple majority, in which all centers have an equal vote, is employed.

Continual Communication
Weekly teleconferences. Monthly video conferences. Numerous on-line discussion forums.

Ad Hoc Task Teams
For specific tasks and design/development efforts.

Incremental Deployment
Development of new functions is based around an incremental deployment philosophy, first prototyping small elements and initiating small pilots, then deploying proven models and implementing working enhancements as new tools are deployed.

Pioneering a new way of interacting, employing some revolutionary techniques, and avoiding a top-down, authoritarian methodology, have all protected the team against territorial bureaucracies.

A very cohesive and productive team effort has resulted from continual communication throughout the evolution of the NAIS initiative. Since mid-1995, the team has conducted weekly teleconferences and monthly video conferences. Additionally the team operates on-line discussion forums for a number of activities. One on-line forum is used to share and discuss news, ideas, issues, and concerns. The team also uses the forum to post draft documents for review and comment. Another forum is maintained for review and discussion of Change Control Requests submitted against operational applications. These forums eliminate the typical obstacles to open discussion among participating representatives who are geographically dispersed and have vastly different work schedules.

The NAIS team is really a small group of employees from each NASA Center. Most work only part-time on NAIS activities. They rarely meet except at annual workshops.

The NAIS team tackles specific tasks and design/development efforts by establishing informal ad hoc groups. These ad hoc groups, which take top-level direction from the NAIS-wide team, determine the appropriate strategy and manage their tasks themselves. Each group's membership varies depending on skills and interest, and there are no restrictions or preconceived notions for identifying the group leads.

The NAIS team approaches the development of new functionality based around an incremental deployment philosophy, first prototyping small elements and initiating small pilots,

Why NAIS Works

Lessons for Industry and Other Agencies

Establish a virtual office. To ensure team success when members are geographically dispersed, establish and operate a comprehensive, on-line virtual office, which includes:
- Meeting agendas and minutes
- Point-of-contact information
- Action-item tracking
- Business practices
- Links to development and pilot activities demonstration tools, and related external sites
- Draft documents requiring team review
- Summary and detailed operations metrics
- Suggestions tracking
- Records of presentations and demonstrations
- Discussion forum
- List service for broadcasting messages to all team members and observers
- Archive of the team's historical records.

Involve the right people. Appropriate skill sets (e.g., technical, functional, and policy) should all be involved in the development of tools and applications. Also, welcome ideas and suggestions from representatives outside the team.

Listen to customer feedback. Routinely solicit, review, and consider customer/user feedback. The NAIS provides for on-line feedback linked from each of its features. NAIS users have been a valuable resource for improvement suggestions. Suggestions are reviewed by members of the NAIS team and often lead to NAIS enhancements.

Track your progress. Tracking progress and collecting metrics on team activities, tools usages, etc., makes it easier to know when to continue with a project or when to abandon it. Such data can be crucial when justifying your work during times of tight budgets.

Monitor Commercial developments. Stay in tune with developments in the commercial sector. Be mindful of what industry is doing in order to avoid becoming a government-unique solution.

then deploying proven models and implementing working enhancements as new tools are deployed.

The words "success" and "innovation" are not always used in conjunction with government teams. However, the accomplishments of the NAIS team have been recognized with various awards, including the Space Flight Awareness Team Award in November 1996, semifinal recognition in the Innovation in American Government Awards Program in April 1997, and the NASA Group Achievement Award in June 1997.

Additional NAIS Successes

After the development of the EPS, the service continued to evolve, developing more easy-to-use services for procurement professionals and prospective vendors. Other major advances included:
- A search capability that speeds up the identification of business opportunities for vendors
- An e-mail notification feature that sends out opportunities to registered vendors immediately upon availability
- Point-and-click access to NASA's Financial and Contractual Status system, a database of summary level information on active contracts
- A Past Performance Database System that provides data on contractor performance to contract specialists across the agency.

The NAIS also grew to provide on-line access to acquisition forecasts, sealed-bid abstracts, small business assistance documents (e.g., program points-of-contact, active contract listings, and NASA's mentor-protégé program information), acquisition regulations, descriptions of major procurement streamlining initiatives, and other general procurement information. Throughout

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The first of several awards, here the NAIS team accepts the 1996 Space Flight Awareness Team Award.

the development of these additional services, the NAIS team continued to approach development tasks innovatively. An excellent example of the group's inventiveness was exhibited in the summer of 2000. At that time, all NAIS applications used the Oracle database. The NAIS team had been notified of a new Oracle pricing structure that would be prohibitive based on the team's budget. Members of the NAIS team had already begun investigating various open-source products to use with the NAIS applications. After performing various tests and benchmarking activities, the team made the decision to abandon Oracle and replace it with the open-source database mySQL. Within three months, all NAIS applications were ported to the new database environment. After only a short amount of testing, the applications were moved into production. This bold move provided a robust database framework for the NAIS applications while avoiding the cost associated with the continued use of Oracle.

The NAIS team has been forced by very restricted budgets to work in a most innovative manner. Its successes could only be achieved by the members' open minds to some seemingly radical ideas. For example, several critical NAIS applications and features are built around free software downloaded from the Internet: Glimpse software drives the NAIS regulation search, Perl continues to be used for software development, and mySQL is the database used by all applications. While some might consider this a risky proposition, the NAIS team has enjoyed tremendous success with Internet-based tools and products. Without these alternatives, the lack of funds would have prohibited many of the NAIS solutions.

The NAIS team has been forced by very restricted budgets to work in a most innovative manner. Its successes could only be achieved by the members' open minds to some seemingly radical ideas.

What Customers Think

Feedback from the NAIS users, both internal and external, reflects how the NAIS solutions benefit them. When NAIS was first conceived, many felt this new electronic model for disseminating information on government acquisition opportunities would unduly burden small and small disadvantaged business, a core group of federal suppliers. On the contrary, the NAIS has torn down barriers to entry. Over 70 percent of NAIS users are from that same group.

Furthermore, new sources of supply were identified with the new Internet model. Over 50 percent of survey respondents indicated that they had never done business with the federal government prior to NAIS and almost 90 percent had not bid on NASA contracts. This increased competition has resulted in lower contract prices. In some cases where only one source was previously known, several have now become available. Some vendors have expressed pleasant shock over the breadth of information available, which facilitates more informed proposal development. Others with handicaps that prevent them from visiting NASA centers have noted that they can now easily obtain acquisition opportunities from their desktops while at home. Such concepts had never been dreamed of in the past.

The Agency's Contracting Officers corroborate the feedback obtained from industry. They have reported increased activity with new suppliers, particularly small and small disadvantaged businesses. They have also noted increased speed of communication. Instead of waiting several days for solicitations to get in the hands of prospective offerors, Contracting Officers have received phone calls and e-mails within 10 minutes of posting solicitations onto the Internet. The NAIS enables NASA procurement offices to better inform potential suppliers of acquisition activities and milestones throughout the solicitation and proposal evaluation process. Therefore, all involved stay current with accurate information via the Internet model, which avoids paper-based, time-consuming communication processes.

The Web-based desktop solutions in the federal acquisition arena is analogous to the infusion of the telephone in the business world. Just as the phone became a critical tool to the conduct of business, the desktop computer, connected to the Internet, is a must for all suppliers doing business with NASA and ultimately the entire federal government.

Federal Government Adopting NASA's Model

Ever since its implementation, the NAIS has been recognized throughout the federal government and industry as *the* model for pursuing EC over the Internet. The NAIS has been demonstrated more than 100 times to other federal agencies, industry groups, and foreign governments.

The demonstrations and publicity have led numerous federal departments and agencies to pursue the Agency's model, some actually taking NAIS software, replacing the NASA insignia, and installing the software under their own banner. An interagency group initiated a pilot based on NAIS that has been operated by the General Services Administration on a federal-wide basis for several years, and has recently been designated as the single government-wide entry point for acquisition opportunities throughout the federal government. All departments and agencies are to coordinate their acquisition opportunities with the new entry point, called FedBizOpps, by the end of this year. This service will replace the paper-based CBD.

Lessons Learned

The NAIS team's success is based on several factors that might be important to other organizations and agencies considering similar initiatives. Lessons learned apply to both industry and government. *Why NAIS Works* shows that involving the right people, soliciting customer feedback, tracking progress, monitoring developments in new commercial technology, and setting up a multifunction virtual office are components of an effective initiative. There are, additionally, specific tangible benefits that can be enumerated and can serve as lessons to others.

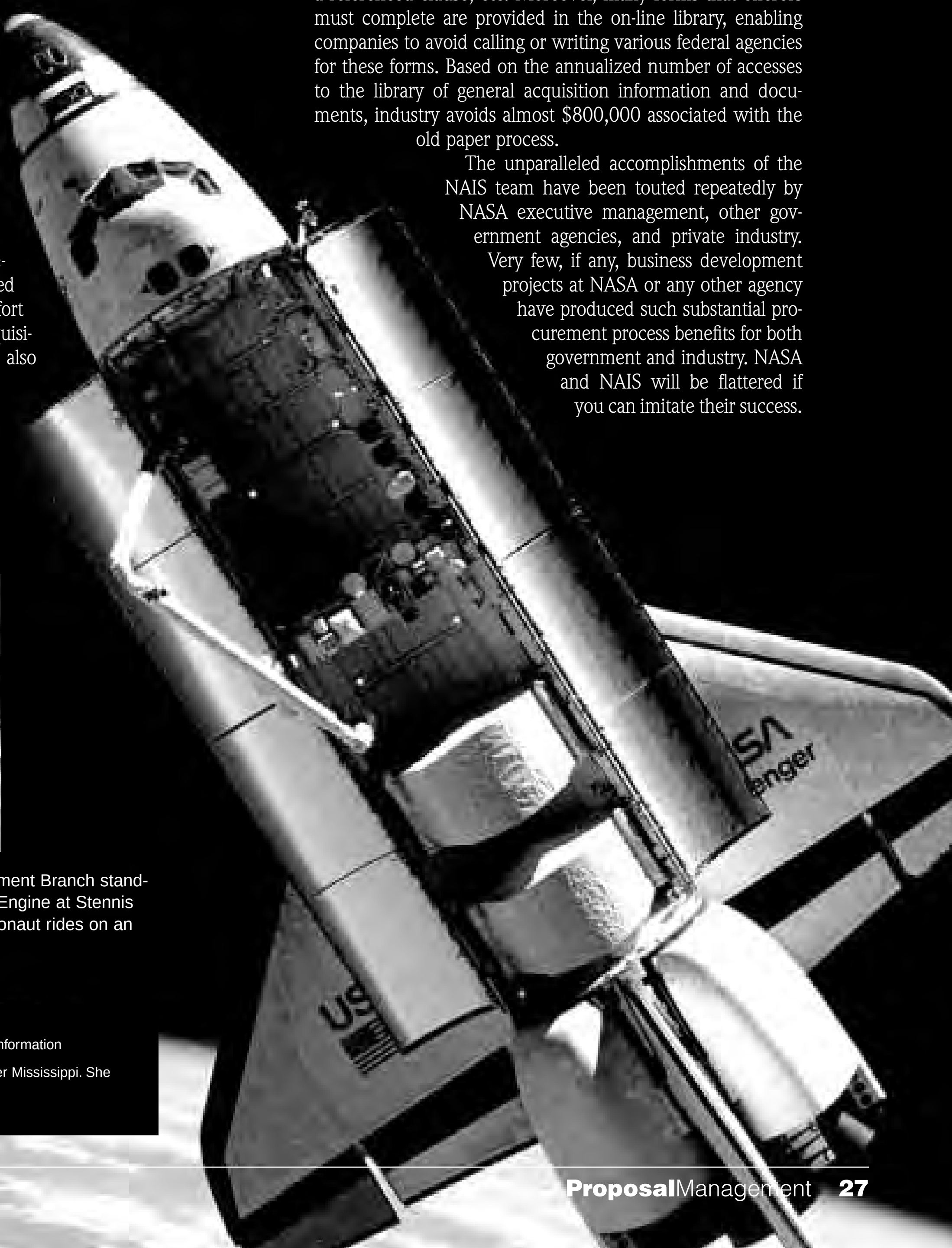
Since NAIS implementation, the number of prospective offerors using it has grown annually, leading to a significant increase in the average number of offers received. Prior to NAIS implementation, NASA received on the average 6.1 offers per contract action. Recent NAIS metrics indicate that this figure has grown to 7.2 offers per contract action. Additionally, the increased competition has been noted in some instances to lower contract values.

The NAIS model has slashed procurement lead-times, contributing to a 40 percent reduction for midrange procurements. Using the Web-enabled EPS via their desktop Internet browser, the NASA procurement staff avoids very laborious paper-induced steps by generating synopses on-line, posting them directly onto NAIS Internet servers, and uploading solicitation files within minutes of approval for release. The old paper process required several days of logistical effort involving numerous employees. Prospective offerors now access the solicitation within minutes of its approval rather than waiting over a week for a paper copy by mail. In addition, the offerors can copy and paste from the solicitation files to support proposal development, thus avoiding laborious re-keying.

Over $4.5 million in cost avoidance is realized by NASA and industry annually through use of the NAIS tool suite. The NAIS has made at least four distinct contributions in cost avoidance for the procurement process:

1. **Eliminating paper documents**—According to NAIS estimates, each mailed paper solicitation document costs NASA an average of $31. Therefore, every solicitation copy downloaded from the Internet saves the Agency $31. Since NASA releases more than 35,000 solicitations annually, savings to the Agency are in excess of $1 million.
2. **Reducing time to identify opportunities**—Providing on-line access 24 x 7 and enabling vendor searches by "pushing" announcements out by e-mail has eliminated much of the prospective offerors' effort and time consumed in getting acquisition opportunities in-hand, and has also reduced the number of "missed opportunities." Based on the number of solicitations distributed via the NAIS, industry saves almost $1.5 million annually from the on-line identification and access to NASA acquisitions.
3. **Eliminating query coordination and programming efforts for contract summaries**—Because advance marketing and planning are so critical to federal suppliers, companies routinely request NASA to provide information on active contracts to enable them to become familiar with what and where NASA spends its money, what subcontracting opportunities exist, and what contracts may soon be re-competed. By establishing Web-enabled access to NASA's contract summaries database, the NAIS quickly produced noticeable savings in handling queries. Both the public and NASA's procurement staff have been provided a "point-and-click" means to obtain information. Based on the annualized number of on-line queries performed, NASA is avoiding almost $600,000 annually in query activities
4. **Reducing time to identify applicable regulations and other pertinent documentation**—The NAIS hosts a library of procurement regulations, procedures, policies, and forms. Having these available to the public on-line at all times minimizes the time and effort industry must spend tracking down a referenced clause, etc. Moreover, many forms that offerors must complete are provided in the on-line library, enabling companies to avoid calling or writing various federal agencies for these forms. Based on the annualized number of accesses to the library of general acquisition information and documents, industry avoids almost $800,000 associated with the old paper process.

The unparalleled accomplishments of the NAIS team have been touted repeatedly by NASA executive management, other government agencies, and private industry. Very few, if any, business development projects at NASA or any other agency have produced such substantial procurement process benefits for both government and industry. NASA and NAIS will be flattered if you can imitate their success.



Gay Irby, Chief, Information Management Branch standing in front of a Space Shuttle Main Engine at Stennis Space Center. Irby says "Every astronaut rides on an engine tested here at SSC."

Gay T. Irby was recently promoted to Chief, Information Management Branch at Stennis Space Center Mississippi. She can be reached at Gay.Irby@ssc.nasa.gov.

Article

Word Power

Struggling with Word frames? Make placing artwork in proposals easy with this Word add-in.

By DICK EASSOM

Many of us only use a fraction of the tools available in Microsoft® Word, and struggle with the ones we do not use very often. If I conducted a survey on Word's most confusing feature, 'frames' would be somewhere near the top of everyone's list. However, as I will explain below, frames are the ideal tools for holding artwork and captions in your proposal documents. In this tutorial, I will show you how to make using frames easier by harnessing the power of Word's macro language: Microsoft® Visual Basic® for Applications (VBA). At the end, you will have a valuable addition to Word for your proposal activities — an add-in that allows you to place artwork placeholders at specific locations on a page using only a single mouse click. We will go through the process step-by-step, from designing the document template, through creating a simple macro, to building the complete add-in.

Although the complete add-in is available from the Steve Myers & Associates, Inc. Web site at www.smawins.com/APMP, I recommend that you work through the steps in the article to get a better understanding of the techniques involved. Once you discover Word Power, I guarantee you will be inspired to create your own macros!

I have been using the techniques described below for more than two years, and, in every instance, have dramatically improved the efficiency of both my authors and my production team. The add-in is simple to install, requires minimal training, and is configurable for all proposal formats in Word.

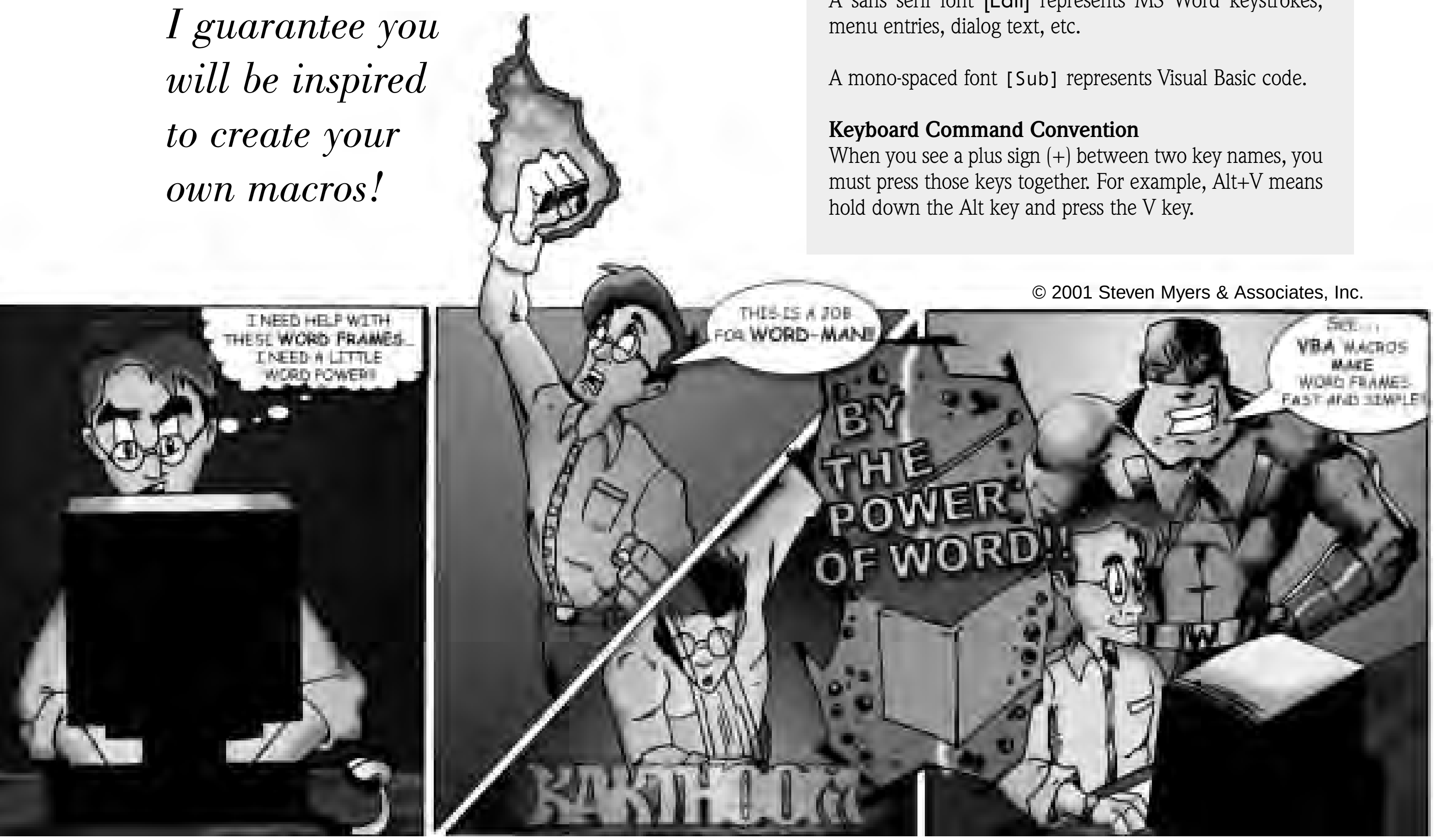
Once you discover Word Power, I guarantee you will be inspired to create your own macros!

Conventions in this Article

Typeface Conventions
A sans serif font [Edit] represents MS Word keystrokes, menu entries, dialog text, etc.

A mono-spaced font `[Sub]` represents Visual Basic code.

Keyboard Command Convention
When you see a plus sign (+) between two key names, you must press those keys together. For example, Alt+V means hold down the Alt key and press the V key.



The Artwork Placeholder Tool – Creating the Template

Placing artwork in frames

There are three ways to insert graphics into a Word document: a simple paste, either in-line with text or floating; pasting into a text box; or pasting into a frame. The table below compares these various approaches.

	Simple Paste	Text Box	Frames
Can contain more than one element, e.g., picture and caption text?	No	Yes	Yes
Can height, width and location be preset?	No	No	Yes
Can automatically adjust to height of graphic, with fixed width?	No	No	Yes
Can contain fields, such as automatic caption numbering, that can be referenced from text?	No	No	Yes
Can be seen in 'Normal' view?	Yes	No	Yes

Frames are obviously the best way to go for proposal artwork. The only advantage that a text box has over a frame is the ability to link text boxes together so that text flows from one to the next automatically — very useful for a newsletter, but rarely used in a proposal.

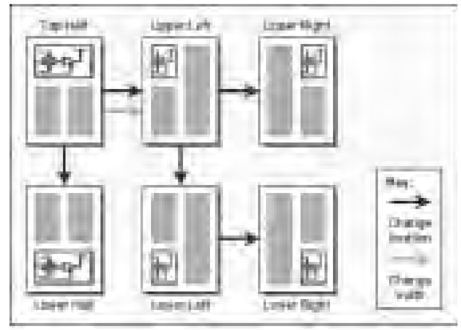
Defining a frame using styles

We can define a frame using styles. This allows us to place the frames at different locations on the page by defining styles for each location. For our Artwork Placeholder Tool, we are going to define styles for frames at the top and bottom of the page, and for each corner, i.e., top left, top right, bottom left and bottom right. These corner frames are one text column wide.

Style Hierarchy

Our frame styles contain information about the location of the frame on the page and the width of the frame. The latter corresponds to the width between the margins for a full-width frame, or the width of a text column for a corner frame. If we change the paper size, e.g. to A4, or the margins, we will need to change the frame sizes correspondingly. We can minimize our effort by basing one style on another. Each new style inherits the properties of the style it is based on, so we need to decide the parameter that changes the most from document to document.

In this case, the frame width seems the likely candidate, as mentioned above. Next is probably the font used for the caption line. Parameters such as location on the page do not change, i.e., a top left frame is always in the top left of the page, regardless of the document template. The diagram to the right shows how we are going to create our style hierarchy:



Creating the Styles

Many of you may have created custom templates before, but I will go through the process of creating the styles we need for the sake of completeness.

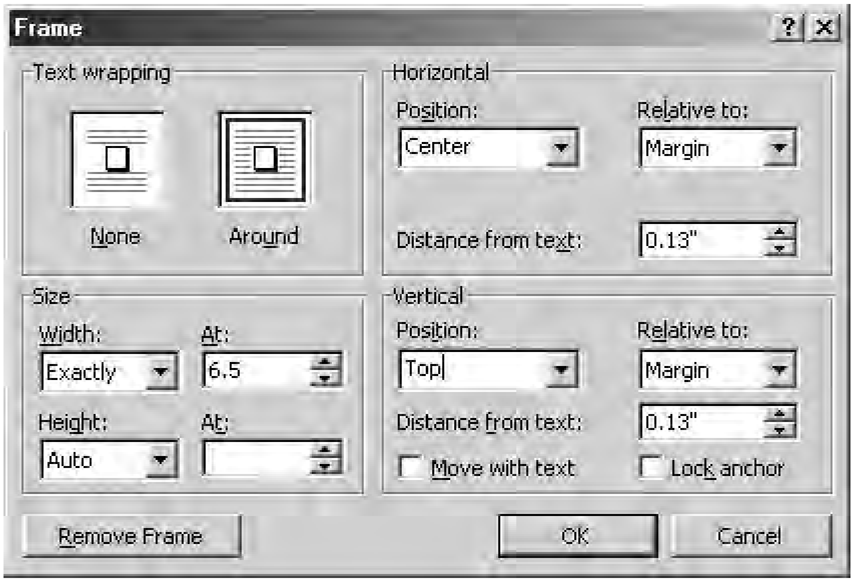
To create our styles, we first need to open a new document template. Click on New from the File menu, select Create New Template in the New dialog, and then click on Create. Save this template as ArtFrames.dot. Select Style from the Format menu. This will display the Style dialog. Click on New to display the New Style dialog. The first style we are going to create is for the caption line in an upper half frame. We will call it ArtUH, so enter this in the Name box on the dialog. Pull down the Based on list and select (No style), so that styles in Normal.dot do not modify our new styles.

Now choose a font for your caption line, e.g. 11-point Arial Italic, by clicking on Format and selecting Font. Set the paragraph alignment to, say, centered, by clicking on Format and selecting Paragraph. You should also set some space after the line in the paragraph format, e.g. 6 points. The New Style dialog should look like this:

more...

Now add the frame setting by clicking on Format and selecting Frame. This displays the Frame dialog. Set the Width to Exactly at 6.5" (I am assuming standard letter-sized paper with 1" left and right margins). Leave the Height set to Auto, as this will allow the frame to expand when we paste a graphic into it.

As this is the frame for an artwork placeholder at the top of the page, set the Horizontal Position: to Center, Relative to: Margin, and the Vertical Position: to Top, Relative to: Margin. Leave Text wrapping at Around, and leave the Move with text and Lock anchor options unchecked. Your Frame dialog should look like this:



While we are here, let us discuss those two options. A popular misconception about Lock anchor is that it anchors the frame to a particular page. It actually anchors the frame to a particular paragraph, so, if that paragraph is moved to another page as, say, text is inserted in front of it, then the frame will also jump to the new page. This can get very confusing for the casual Word user, especially when there is not enough space on the page to hold the frame and it is anchoring paragraph — in which case it will automatically jump to the next page. Most of the time, you will want to leave Lock anchor unchecked, as it prevents you from moving the anchor point from one paragraph to another to keep the frame on a particular page.

Move with text will preserve the offset between the frame and the anchoring paragraph. For example, if the frame is initially created 2" above the anchoring paragraph, and Move with text is checked, then the frame will remain 2" above the paragraph as the paragraph moves. Obviously, this is *not* what we want for our proposal graphics.

Click on OK when you have finished setting up the frame, then click on OK on the New Style dialog. Now we need to create the remaining styles that will define our frames. The table below shows the styles, which style each is based on, and the settings you need to change in the Frame dialog (I have assumed a 0.5" spacing between text columns):

STYLE	BASED ON	WIDTH	HORIZONTAL	VERTICAL
ArtUH	(No Style)	6.5"	Center to Margin	Top to Margin
ArtLH	ArtUH	6.5"	Center to Margin	Bottom to Margin
ArtUL	ArtUH	3.0"	Left to Margin	Top to Margin
ArtUR	ArtUL	3.0"	Right to Margin	Top to Margin
ArtLL	ArtUL	3.0"	Left to Margin	Bottom to Margin
ArtLR	ArtLR	3.0"	Right to Margin	Bottom to Margin

With the style hierarchy we have set up, we only need to change settings in two styles to accommodate different left and right page margins. Let us say that we need to have 0.75" left and right page margins and only 0.25" spacing between columns. From the Format menu, click on Style, and then select the ArtUH style. Click on Modify to display the Modify Style dialog. Now click on Format and select Frame. Set the Width to Exactly at 7" (i.e., 8.5" – 2 x 0.75"). Click on OK to close the Frame dialog and OK again to close the Modify Style dialog. The ArtLH style will inherit the change we just made.

Now click on the ArtUL style. Using the same procedure as above, set the frame width for this style to 3.13" (i.e., (7" – 0.25") / 2—it should be 3.125" but Word will round this up to 3.13"). All the styles used to define single-column frames will inherit this change.

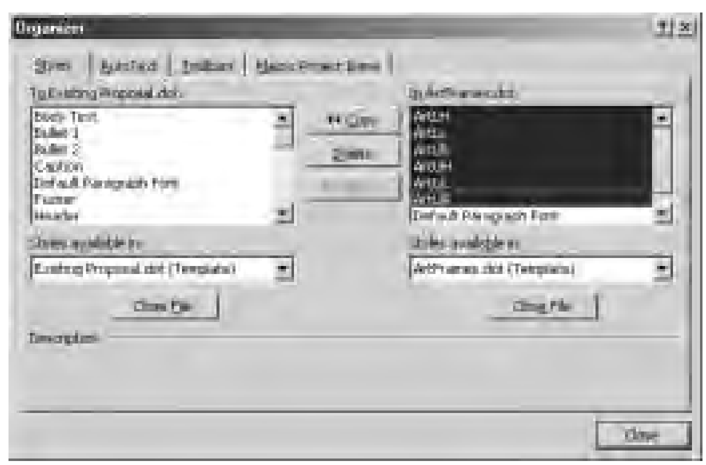
Make sure you save the ArtFrames.dot template!

Adding the styles to an existing template

Now we have our frame styles in a document template. However, we may need to use the Artwork Placeholder Tool with templates we have already created. We can easily copy the frame styles into an existing template by using Word's style organizer. Open the existing template, click on Style from the Format menu, click on Organizer, and then select the Styles tab. The left of the Organizer dialog shows the styles in the existing template.

The right of the dialog will probably show Normal.dot. Click on the right-hand Close File button to close Normal.dot. The button caption will have changed to Open, so click on this and find ArtFrames.dot — Word will have saved it in its Templates folder by default.

You should now have the art frame styles displayed on the right of the dialog. Click and drag over the Art styles to select them, as shown in the figure below, then click on << Copy to copy these styles to your existing proposal:



The left of the dialog now displays our Art styles, and you can now close ArtFrames.dot and close the Organizer dialog. Now we have our art frame styles, we can create the macros that allow us to easily create the frames in a proposal document. But first we need to understand macros!

Macros

What is a macro?

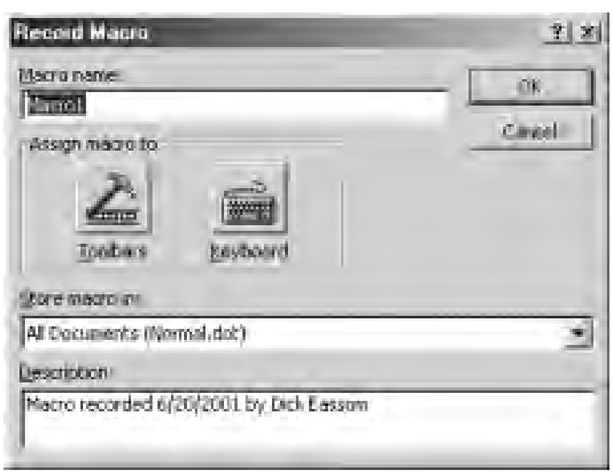
A macro is a series of Word operations accessible from a tool bar or a short cut key sequence that simplifies a complex operation, or speeds up a repetitive operation. You can create a macro by capturing keystrokes and use it without any knowledge of Microsoft® Visual Basic® for Applications (VBA), the special programming language behind the macro. Based on the popular Microsoft® Visual Basic® programming language, Visual Basic is built in to Microsoft® Office products such as Word, Excel, and PowerPoint®, as well as non-Microsoft products such as autodesk® and AutoCAD®. We are going to concentrate on Visual Basic in Word in this article, but this familiarity will help you tackle macros in other Office applications.

Macros can be incredibly powerful tools to increase Word's functionality, and planning your macro beforehand is extremely important. First, make sure that Word does not have the functionality you require buried in an existing feature somewhere. For example, you could write a macro to apply formatting, but that is probably better handled (and faster) by designing a custom style.

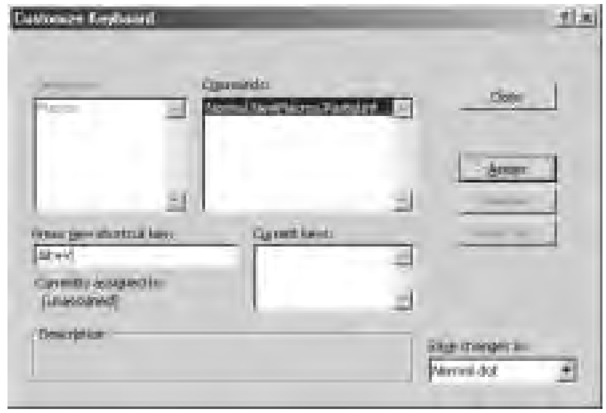
Recording A Macro

Let us start with a simple macro. We often need to copy text from one document to another. However, how many times have we done this, only for the styles in the source document to overwrite, modify or corrupt our carefully designed styles in the destination document? Clicking on Paste Special from the Edit menu, then selecting Unformatted Text, cures this by removing all formatting from the source. So let us create a simple macro to make this available from a shortcut key, say, Alt+V (This shortcut is not normally assigned).

First, we are going to need something to paste. Open a new Word document and type any text. Then select it and copy it to the Windows clipboard using Ctrl+C or click on Copy from the Edit menu. Now we can create the macro. From Word's Tools menu, click on Macro, and then click on Record New Macro. Word will display the Record Macro dialog:

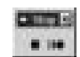


In the Macro Name box, type PasteUnformattedText as the name of your macro. As we want to be able to access the macro from a keyboard shortcut, click on the Keyboard button. Word will display the Customize Keyboard dialog:



Type Alt+V to assign this shortcut to the macro, and then click on Assign. Note that, by default, Word stores macros in the Normal.dot template, as shown in the Save changes in box. We will come back to the storage location later in the article. Also, note that the dialog shows any existing use of the shortcut.

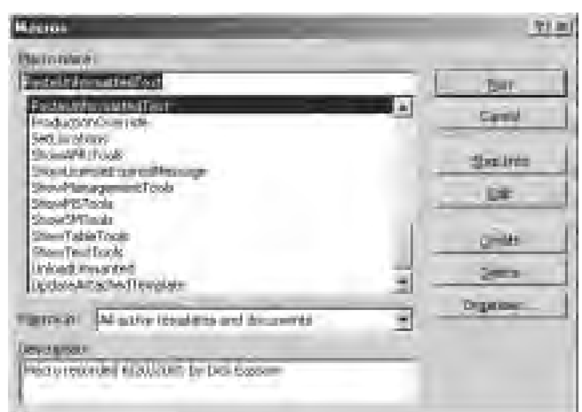
When you click on the Close button, the Customize Keyboard dialog disappears and is replaces by the Stop Recording toolbar:



Word is now ready to accept your actions and record them in the macro, just like a tape recorder. We have still the dummy text we created earlier in the clipboard, so from the Edit menu, select Paste Special, then Unformatted text from the As: list in the Paste Special dialog. The text will appear in the document, less any formatting. That is all we want the macro to do, so click on the Stop recording button on the Stop Recording toolbar.

Running A Macro

Now we have created our macro, we can run it any time we want by pressing Alt+V. The macro appears in a list of macros currently available in Word's Macros dialog. We can also assign it to a menu, and later in this article, we will assign it to a tool bar. Let us look at Word's Macros dialog. From the Tools menu, click on Macro, and then click on Macros (you can also get to this dialog by pressing Alt+F8). Word will display the Macros dialog, from where we can manage all our macros:



To run a macro, select it from the list and click on Run. As we have assigned it to a shortcut key, we can also run our macro by pressing Alt+V. Try them both.

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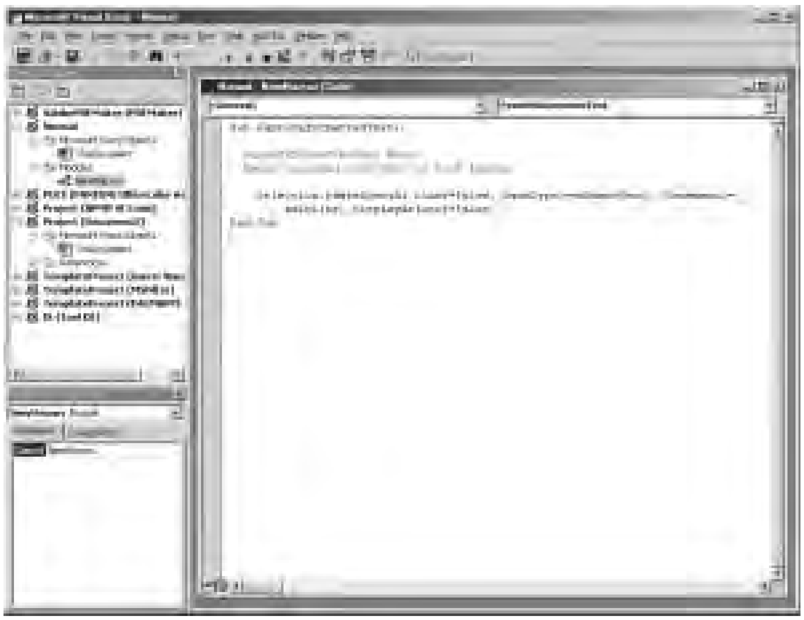
So now we know how to create simple macros and assign them to the keyboard. However, to create the Artwork Placeholder Tool, we will have to look under Word's hood and have a look at the Visual Basic code that was recorded for our macro.

Editing A Macro With Visual Basic

This is not as scary as it may appear to the non-programmer! We can look at the Visual Basic code behind our macro by opening the Visual Basic editor. Pressing Alt+F11, or, from the Tools menu, clicking on Macro, and then clicking on Visual Basic Editor, displays the VB editor. We will now have a look at the various elements of the editor:



There are four main parts to the editor:

- The menu and tool bars
- The project window, at the top left, shows all the documents, template and add-ins currently loaded in Word
- The properties window, at the bottom left, shows the properties of the currently selected object — in this case the NewMacros code module of Normal.dot
- The code window, on the right, shows the Visual Basic code behind the macros.

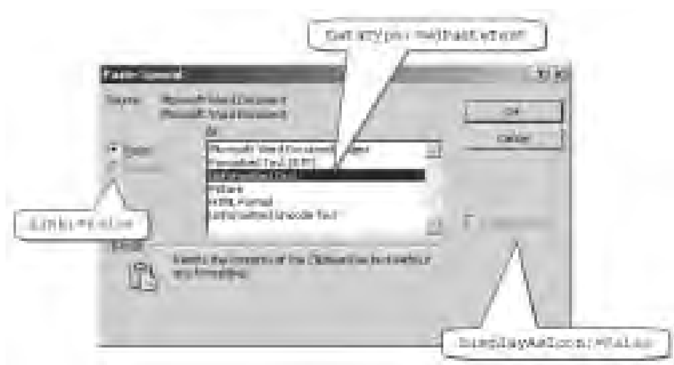
We only need to concentrate on the code window at this time. We can see the name of our macro, `PasteUnformattedText`, is included after the word `Sub`. This is short for 'subroutine' — the programming name for a number of lines of code that perform a particular 'routine.' Each `Sub` line has a corresponding `End Sub` line, signifying the end of that subroutine.

Next, we can see the green text, where each line starts with an apostrophe. These are comments, useful for describing how the Visual Basic code works, or when we modified it last. We can type anything after the initial apostrophe.

The rest of the text is the actual code. We are calling the `PasteSpecial` 'method' of the `Selection` 'object'. (I want to introduce some Visual Basic terms, so if you are beginning to look like a deer caught in the headlights of an oncoming car, stay with it, the results are well worth it!) Simply put, a 'method' is something you can get an 'object' to do. In this case, the object is the `Selection` object, probably the most commonly used object in Word. When click on somewhere in a Word document, the `Selection` object is simply the location of the cursor. If you select some text, the `Selection` object is the selected text, including the start and end positions within the document.

So, by calling `Selection.PasteSpecial`, we are going to paste whatever is in the clipboard at the cursor location, or replace any select text with the clipboard contents.

The remainder of the text on that line of code specifies the special parameters, or 'properties' of the PasteSpecial method. In this case, we are going to paste text (`DataType:=wdPasteText`), inline with existing text (`Placement:=WdInLine`), not linked to the source file (`Link:=False`) and not displayed as an icon (`DisplayAsIcon:=False`). If you display Word's Paste Special dialog again, you will see that these properties correspond to the options available in the dialog:

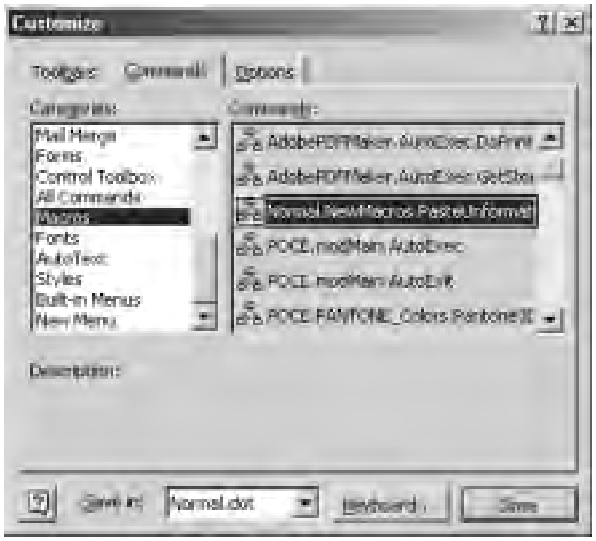


The `Placement` property is not applicable to text, so it does not appear on this dialog. In fact, it is actually on the Format Picture dialog. So what happens when then clipboard does not contain text? Try it! Insert a picture, select it, copy it to the clipboard, then try running our macro. Oops! Visual Basic gives us an error message saying that the requested data type, i.e., text, is not available. So how do we prevent the error message? We can insert some more code to bypass the macro if an error occurs. Go to the VB editor and click in the code window at the beginning of the `Selection.PasteSpecial` line. Press Enter to get a new line, then type `On Error Resume Next`. Your code window should look like this:

Try running the macro again with a picture in the clipboard. This time we do not get an error message — the code we added makes Visual Basic skip over a line of code that produces an error. Now we have a bulletproof macro! Note that some consider using the `On Error Resume Next` code to be bad programming, and it can mask more important errors in complex code. However, for our simple macro, it is an ideal fix.

Creating a Tool Bar

We can easily add an icon on a toolbar for our new macro. Let us add it next to the existing Paste icon on Word's Standard tool bar but, say, give it a different color. To add, modify or delete the icons on the tool bars, click on Customize from the Tools menu. This displays the Customize dialog. Choose the Commands tab and, under Categories, go down to Macros. The Commands list shows the macros currently available:

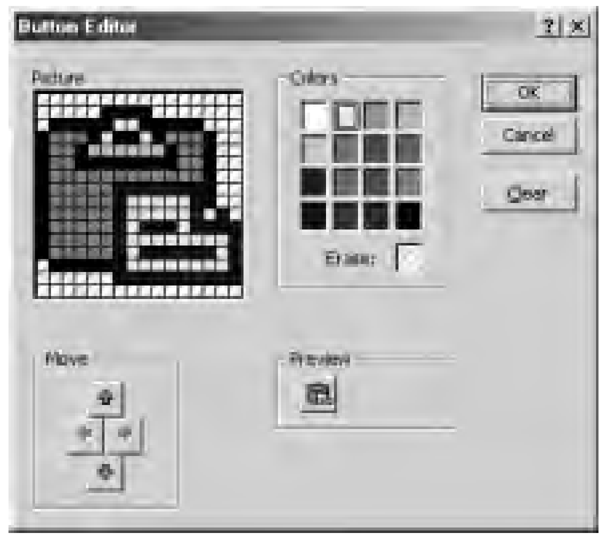


Click on your macro, hold down the left mouse button and drag the macro to the tool bar. Your Standard toolbar should look like this:

This does not look very neat, but we can modify its appearance using the Customize dialog. Click on Modify Selection on the Customize dialog. On the pop-up menu, click on Default Style, to show just the icon, and change the name to Paste unformatted text. You will need to click on Modify Selection again after each change:

Now your Standard tool bar should look like this:

Well, that is a lot better, but the icon is somewhat meaningless. We planned to copy the regular Paste icon and change its colors, so, with the Customize dialog still open, click on the regular Paste icon. Click on Modify Selection on the Customize dialog, then click on Copy Button Image. The regular Paste icon is now in the clipboard. Now select our macro's icon, then click on Modify Selection and Paste Button Image. Our macro now has the regular Paste icon. Click on Modify Selection and then Edit Button Image. Word will display the Button Editor dialog. You can now modify the icon using the different colors available. I simply changed the clipboard to yellow in the example below:



Click on OK when you have finished, then click on Close on the Customize dialog. Now we have a custom icon for our macro:

Before we move on, let us recap what we learned in this section. We have learned how to record a macro, assign it to a keyboard shortcut, edit the macro in the VB editor, assign it to a tool bar and customize the tool bar icon. In the next section, we are going to create the Artwork Placeholder Tool.

The Artwork Placeholder Tool – Creating the Add-in

Templates And Add-Ins In Word

We are used to creating a Word template, i.e., a '.dot' file, to format our documents with custom headers, footers, styles, etc. These templates are normally stored in Word's Templates folder so they are available when starting a new document by selecting New from Word's File menu. However, the easiest way to distribute a macro to other people is to define it as part of a document

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template that Word opens each time it starts. It now becomes an 'add-in.' Add-ins can also contain custom tool bars for our macros.

So, if we wanted to give everyone our Paste Unformatted Text macro, we could store it in a separate Word template, instead of Normal.dot. This also has the advantage that the macro is not lost if you ever have to delete Normal.dot (This file can become corrupted and can cause some strange things to happen in Word. Deleting it will often fix erratic behavior and Word will create a new, clean Normal.dot when it restarts.) We will be storing our macros for the Artwork Placeholder Tool in a separate template for these reasons.

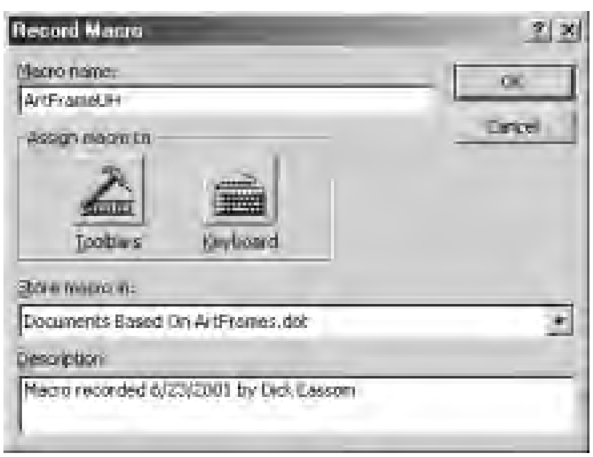
To have macros always available in Word, we must save the macro template in Word's Startup folder, normally located at …\Program Files\Microsoft Office\Office\Startup. Note that the location of this folder can be changed by selecting Options from the Tools menu, then clicking on the File Locations tab.

Capturing The Code In A Macro

Building a frame using styles is as simple as creating a new, blank line and applying the relevant style. We need two lines in our frames, one for the artwork and one for the caption, so we need to create two blank lines and apply the relevant style in turn. We will start by creating the macro to place a frame at the top of the page.

With the ArtFrames template as the active Word document, press Enter a few times to create some blank lines, got back to the top of the document, then start the macro recorder. Note that another way of starting the macro recorder is to double-click on the dimmed REC box at the bottom of the Word editor window:

Word will display the Record Macro dialog. By default, Word will want to save new macros in Normal.dot, so pull down the Store macro in: list and select Documents Based On ArtFrames.dot. We will call this macro ArtFrameUH:



Click on OK as we are not going to assign the macro to a keyboard shortcut or a toolbar at this time. The cursor should be at the top of the page, so format this line as ArtUH by selecting that style from the Style drop down menu. The frame will appear at the top of the page. Now press Enter to create another line. As the style definition for ArtUH formats the following paragraph in the same style, this second line should also be inside the frame. Type "Figure 1. Caption.", then press the right-arrow to leave the frame. Stop the macro recorder.

Modifying The Code

Now we have a working macro for the frame at the top of the page, we can use the VB editor to create macros for the remaining frame locations. We will copy the code, paste it into new macros and modify it.

Go to the VB editor (press Alt+F11), and select the New Macros module of the ArtFrames.dot template project to display the code. Your code should look like this:

```
Sub ArtFrameUH()
'
' ArtFrameUH Macro
' Macro recorded 6/23/2001 by Dick Eassom
'
    Selection.Style =
ActiveDocument.Styles("ArtUH")
    Selection.TypeParagraph
    Selection.TypeText Text:="Figure 1.
Caption."
    Selection.MoveDown Unit:=wdLine, Count:=1
End Sub
```

Now we will look at this line by line. The first line sets the `Style` property of the `Selection` object to the `ArtUH` style in the `Active Document`, i.e., ArtFrames.dot. The `Selection` object in this case is the insertion point (i.e., where the cursor is in the document) and, as ArtUH is a paragraph style, it is applied to the complete paragraph.

But what happens if the cursor is in the middle of a paragraph of text when the user activates this macro? All the text will be put in the frame — not a desirable result! So we need to prevent that from happening by always creating a new, blank line when we run the macro. Moreover, we also need to make sure that the cursor is at the beginning of a paragraph before we create the blank line!

We can add some code to the macro to do this. Enter the following code before the `Selection.Style` line in the macro:

```
Selection.StartOf Unit:=wdParagraph,
Extend:=wdMove
Selection.TypeParagraph
Selection.Move Unit:=wdParagraph, Count:=-1
```

The first line of this new code moves the cursor to the beginning of the current text paragraph. The second line inserts a new line. The cursor is still at the beginning of the text paragraph, so the third line moves the cursor back to the new line we just created.

The remainder of the code should look fairly self-explanatory. We can make the macro even more reliable (and predictable) by adding a line to ensure that the caption line is formatted with the correct style. Copy the complete `Selection.Style` line and paste it above the `Selection.TypeText` line. Your complete macro should look like this:

```
Sub ArtFrameUH()
'
' ArtFrameUH Macro
' Macro recorded 6/23/2001 by Dick Eassom
'
    Selection.StartOf Unit:=wdParagraph,
Extend:=wdMove
    Selection.TypeParagraph
    Selection.Move Unit:=wdParagraph,
Count:=-1
    Selection.Style =
ActiveDocument.Styles("ArtUH")
    Selection.TypeParagraph
    Selection.Style =
ActiveDocument.Styles("ArtUH")
```

```
    Selection.TypeText Text:="Figure 1.
Caption."
    Selection.MoveDown Unit:=wdLine, Count:=1
End Sub
```

You can test this code by typing some text in ArtFrames.dot, then running the ArtFrameUH macro (Press Alt-F8 and select it from the list). Your page should look like this:

Note that the success of this macro relies upon the Art styles being in the template attached to the document we are adding an artwork placeholder to. If the style is not available, the `Selection.Style` line will cause a VB error. We can prevent this by checking for the existence of the style before we try to run the macro. Add the following lines of code in front of the line that begins `Selection.StartOf`:

```
On Error Resume Next
TestForStyle = ActiveDocument.Styles("ArtUH")
If Err.Number <> 0 Then
    MsgBox "Document does not contain art
frame styles"
    Exit Sub
    End If
```

We are using the `On Error` function again to skip over any line that causes an error. The second line assigns the art frame style to a variable called `TestForStyle` (a 'variable' stores data during program execution — in this case the data is a Word style). If the style does not exist in the document, an error occurs, and the third line traps that error, displaying a small message on the screen that waits for the user to click on the message box's OK button. It then exits and does not run the remainder of the code. If there was no error, the style must exist in the document, and the code inserts the artwork placeholder.

Now we need to create macros for the other artwork frame locations. In the VB editor, select and copy the `ArtFrameUH` code, go to the end of the code module, add a blank line and paste the code. Change the first line to read `Sub ArtFrameLH()`, and change all three instances of `("ArtUH")` to `("ArtLH")`. Repeat this for the remaining four 'corner' frames:

MACRO NAME	STYLE NAME
`Sub ArtFrameUH()`	`ActiveDocument.Styles("ArtUH")`
`Sub ArtFrameLH()`	`ActiveDocument.Styles("ArtLH")`
`Sub ArtFrameUL()`	`ActiveDocument.Styles("ArtUL")`
`Sub ArtFrameUR()`	`ActiveDocument.Styles("ArtUR")`
`Sub ArtFrameLL()`	`ActiveDocument.Styles("ArtLL")`
`Sub ArtFrameLR()`	`ActiveDocument.Styles("ArtLR")`

You should now have the six macros, one for each artwork frame. Since we have not assigned any of them to keyboard shortcuts, or existing tool bars, we can only run them from the Macros dialog. To make the artwork placeholder tool effective, we need to create a custom tool bar.

Creating the Tool Bar

With ArtFrames.dot as the active document, click on Customize from the Tools menu, and click on the Toolbars tab. Click on New and enter the name Artwork Placeholder in the New Toolbar dialog. Make sure the Make toolbar available to: box displays ArtFrames.dot:

Click on OK and our new tool bar will be displayed, ready to accept icons. Just as we added the `PasteUnformattedText` macro to Word's Standard tool bar in the first section of this article, repeat the procedure to add the six art frame macros to the new tool bar. You can arrange these any way you like, with icons only, or text and icons, or text only. Here is the one that I did:

Click on Close on the Customize dialog when you are finished, then test each macro in turn to make sure everything works.

Creating And Using The Add-In

The easiest way to distribute the Artwork Placeholder Tool is to save ArtFrames.dot in Word's Startup folder, as described earlier in this article. Open Word and using the Style Organizer copy the Art styles from ArtFrame.dot to your proposal template. Now you can insert artwork placeholders in your proposal documents. Other users only need ArtFrames.dot in their Word StartUp folder. Note that if you do not see the Artwork Placeholder toolbar, click on Customize from the Tools menu, click on the Toolbars tab, and then check Artwork Placeholder.

Where To Go From Here

Conclusions And Enhancements

As I mentioned in my introduction, I have used these techniques for managing frames on numerous proposals over the last two years or so. They are included, along with other timesaving macros, in the SM&A® ToolKit. I have found them to be of enormous benefit to all of the proposal team: from authors to production. For example, using the tool described in this article reduces a complicated procedure, prone to error by casual Word users, to only one mouse click. Quantifying the exact time saving is difficult as it is dependent on the user's knowledge of Word. But regardless of that, less time spent on struggling with Word is more time spent on creating proposal content, and more time for reviews!

I hope you find the Artwork Placeholder Tool useful with your proposal projects, and that this brief foray into the Visual Basic world has not been too scary! Once you become familiar with Visual Basic, there are many enhancements that you can build for this simple tool, such as being able to change the position of an artwork placeholder from, say, upper left to lower right, just by clicking on a tool bar icon.

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Download This Code

The ArtFrames.dot template is available from the SM&A Web site at www.smawins.com/APMP. You will be asked for some details so I know who is using the macros. In return, I will endeavor to give you some support!

Books On Word Visual Basic

Two books that I recommend to give you a more in-depth understanding of Word Visual Basic are, unfortunately, no longer in print. You may be able to get second-hand copies. These books are:

- *Microsoft Word 97 Visual Basic Step by Step*, Michael Halvorson and Chris Kinata, Microsoft Press 1997, ISBN 1-57231-388-9
- *Sams Teach Yourself Visual Basic for Applications 5 in 21 Days, Third Edition*, Matthew Harris, SAMS Publishing 1997, ISBN 0-672-31016-3

Both of these books were written for Word 97, and the SAMS book covers Excel 97 as well as Word, but they are very easy to get in to. Although I have not read the currently available books for Word 2000 Visual Basic, a couple of those that have received praise in Web reviews are:

- *Sams Teach Yourself Microsoft Word 2000 Automation in 24 Hours*, Pamela Palmer, SAMS Publishing 1999, ISBN 0-672-31652-8
- *Learn Word 2000 Visual Basic Document Automation*, Scott Driza, Wordware Publishing 1999, ISBN 1-55622-751-5

Credits

Thanks to Sean Jones of SM&A's Creative Services department for bringing Word Man to life!

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Telecommuting and the Proposal Manager — A Natural Fit

Article

By SHERRI R. GREER

I remember the last time I pulled an all-nighter on a proposal. Of course, it was due the next day and we thought we had everything handled, except the design team from a company we were partnering with did not get us their answers until late in the afternoon. The answers were not concise and the graphics needed a makeover. So, the account manager and I girded ourselves for a late night. The design and pricing engineers had to be prodded at all hours of the night. The demands for coffee breaks abounded. At 2:30 AM we were struggling with an obstinate graphic, and we lost it in a gale of giggles when none of us could get the graphic to behave.

She was laughing so hard, she disturbed her cat that was trying to sleep on top of her laptop.

I still remember how, at one point, the account manager's laughter echoed off my office walls while I collapsed in my pajamas, holding my ribs. She was laughing so hard, she disturbed her cat that was trying to sleep on top of her laptop. The cat stalked away to find a quieter spot to sleep. Pajamas? Cat? Welcome to the world of telecommuting, where all-nighters are pulled in the comfort of your own home instead of a dark, empty office miles away.

Proposal Management Is The "Poster Child" For Telecommuting

Proposal management has always been an industry where long hours and occasional all-nighters are an acceptable part of the work environment. Conference calls that start very early in the morning or run late into the night are normal occurrences. Hours spent staring into the monitor and reviewing drafts tend to fill the majority of our day. When we sit down and get ready to write, we usually want a quiet environment where we can focus on our assignments. Face-to-face meetings are often scheduled in advance, with fixed dates and times.

When I started out in the proposal industry 16 years ago, teams were usually centralized in one location for the proposal effort, at least for some portion of the proposal schedule, and worked face-to-face in large conference rooms. Today, especially in the telecom industry, you do not meet face-to-face with your other proposal team members. Most of my work is done via conference calls with virtual account teams who stay at their location so that they can continue servicing their accounts and doing what they do best—selling. The proposal cycle is managed through conference calls, e-mail, and the manipulation of the drafts that virtual teams exchange electronically.

How We Started Telecommuting

In 1997, I was hired to help build a stand alone proposal group for Network proposals for BellSouth Business. When we started pulling the group together, there was not much enticement to bring in an experienced staff because they would not have the type of support staff to which they were accustomed. However, we felt that this might be offset by the flexibility that comes with working from

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home whenever they needed. Armed with Remote Access on laptop computers and a company-paid second phone line, we recruited highly trained Senior Proposal Managers with an unusual enticement—you can work from home. They came, intrigued by the challenge of working without the production "net" resident in a mature staff, and with the option to work from home almost exclusively.

Learning how to work without a production staff was excruciating. We knew how to use word processing programs so we could do the work ourselves, but that just added more time to an already time-intensive cycle. After a year, we hired one Proposal Coordinator to assist the three Proposal Managers. The Proposal Coordinator helped the Proposal Managers set up, format, and final format the finished proposal. The goal was to transfer final production and assembly to either the account team or to a third party printer. The account teams, for the most part, were used to doing proposals themselves, so production and assembly of the binder was not a big problem.

After receiving a few slipshod proposals in cheap binders with broken rings, bad copies, and missing components, we decided it was time to institute more controls.

We used dial-up connections to telecommute (slow, but steady), and hired a Proposal Coordinator to format and input the electronic document, but we still had to depend on the account team to actually print and assemble. To gain an idea of what the customer received, we requested that a binder be shipped back to us. After receiving a few slipshod proposals in cheap binders with broken rings, bad copies, and missing components, we decided it was time to institute more controls.

We talked with two large printing companies to see if we could develop a program whereby we could e-mail documents and they could print, assemble, and ship within 24 hours. One large nationwide chain wanted us to buy proprietary software, and to electronically send a pdf-style document to one of their city offices. The cost would run us an average of $1,500 for six 1" binders, including color inserted covers, tabs, and documents—too complicated and too expensive. The other company did not have offices in every city where BellSouth offices are located, but they did have the ability to receive e-mail with word documents attached, and they promised to receive, print, assemble and ship within 24 hours. Their estimated price for the same six 1" binders was one-third of the estimated price of the large nationwide company. Finally, there was a way to work from home, get assistance from a Proposal Coordinator for formatting support, and a way to produce and assembly quality documents. We were in business!

Pioneering Telecommuting in a Telecommunications Company

Being the pioneers for telecommuting, even in a telecommunications company, can be difficult. Even our new manager did not always quite understand what we were doing at home since her background was in product marketing rather than proposal development. Many managers who have not been involved in proposal management may not understand the amount of work done alone, without the support of the rest of the team. Some managers may think that your day is spent watching Oprah and eating bonbons on the couch. If you communicate with your team and your management through e-mails and phone calls, and make sure that you are always virtually visible, this perception will be virtually non-existent.

Still, our teleworking proposal managers had to develop a system for checking work voice mail on a scheduled basis, returning pages or voice mails in a prompt and professional manner, and responding to and sending e-mails quickly. Office mates may assume that, since you are not at your desk for days at a time, you have been ill. We learned to change our voice mail greetings daily, letting callers know that we were teleworking and not in the office. We had our voice mail system programmed to page us when a message was left, so we could check, retrieve, and return voice mail messages quickly.

The BellSouth Business Proposal Managers worked in the dial-up mode of telecommuting for almost two years. The very slow dial-up connection would stretch our stress levels, high enough already at the end of a proposal cycle, to the fraying point as time pressure mounted. Downloading documents from our servers was excruciating. We telecommuted as much as we could, but when it came down to crunch mode near the end of the proposal, we had to go back into the office to finish the proposal. This was the only way to download faster, print on faster printers, and be close to the Proposal Coordinator. We always printed a copy to ensure there was no problem at the account team's office or at the printers. Working from home was nice, but had its limitations.

Teleworking Today

BellSouth engaged a consultant to interview potential candidates when they began to look at telecommuting as a way to reduce real estate costs, increase productivity, and improve the quality of life for their employees. After interviewing the Proposal Managers, the consultant declared us poster children for teleworking—our work lives are more conducive to the environment than most jobs because the majority of our work is done electronically and, at least at BellSouth, usually with virtual teams.

BellSouth's marketing staff was working on a program specifically designed for people who would work at home on a full-time basis. Instead of telecommuting, they called it Teleworking. They partnered with a third party vendor, a company internally developed to facilitate and manage work at home programs. BellSouth decided to try this company out on its employees before launching it to the public. An invitation to telework was extended to select BellSouth organizations in Georgia whose managers approved the program. Since the Proposal Managers were teleworking so much already via slow dial-up lines, our manager readily agreed.

The teleworker agreement was to release your workstation for reuse/reassignment by the department or company in exchange for the installation of the teleworking equipment and services in your home. You came into the office at least once a week to pick up your mail and attend meetings, as needed. If you needed to work in the office during the day, you could reserve a "hoteling" cubicle that was set up with a phone and LAN connection. We were provided with an ISDN line, a router, a combination fax/scanner/printer, office furniture, a digital phone, and a 1-800 number for technical support. When the offer was extended, three of four Proposal Managers immediately signed up for the program.

Although the hours we worked stayed the same or even increased, we were happier since teleworking enabled us to work from home during the late evening and early morning hours, and we were able to see our family and pets during those hours.

The Proposal Managers were set up at home and gave up their cubes. Since most of our teams were virtual, we worked via phone conference or e-mail, and our office telephone number rang at our home office, no one really could tell a difference except our managers and ourselves. Although the hours we worked stayed the same or even increased, we were happier since teleworking enabled us to work from home during the late evening and early morning hours, and we were able to see our family and pets during those hours. Our managers saw productivity increase and stress decrease. Most managers either were already acclimated to managing teleworkers, or took courses that BellSouth and their third party vendor offered on how to manage teleworkers.

With the ISDN line, the Proposal Managers could immediately tell a difference. The uploads and downloads to servers from e-mail was much faster. Our work lives smoothed out because we could schedule conference calls as early or as late as the account manager wanted. The dreaded 'late night session' became the 'late night after I fixed dinner, helped the kids with their homework, put them to bed, and got in my jammies for the late night proposal session.' If walking the dog at lunch was what you needed to do, you did it. If you wanted to go watch your kid play ball in the afternoon, you took off for a few hours, and worked later that evening. The frustration and stress level of proposal development dropped to a more manageable level.

How Teleworking Affected Our Proposal Processes

Since our Proposal Management Group was built as a hybrid type of proposal development group versus the "traditional" proposal management department, bringing teleworking into the proposal processes was not that difficult. Indeed, it was built into the process from the start! Our processes usually are much more fluid than the traditional, long-term proposal cycle. For instance:

- Using and Annotating Source Documents. Since our proposal development cycle is so tight (generally, if we get two weeks, we are deliriously happy), there is no time for storyboarding or traditional Project Manager tools. For instance, we generally do not use a status matrix to track the progress of our response—we use the actual proposal documents. After each RFP question, we place the author's name and any comments from the Project Manager. For emphasis, we may show at the top of a document (in the first few lines) any questions that still are unanswered in that section.
- Executive Summaries. Write the Executive Summary first?! Sometimes, if the RFP does not ask for it, we do not even write one! If we do, it is one of the last things we do, because the design and pricing comes in at the very end, so we may not know what the solution is until the last days of the proposal.
- Management Reviews. The Proposal Development Group has several management reviews built into our cycle:

The first is an RFP review by Proposal Development Group Management using an Opportunity Score Card (OSC)—a point-and-click document the account team fills out that gives us, at a glance, the background on the account, the account manager's experience with the account, and other pertinent info.

Second is a review of the RFP by the various teams that make up the proposal team: account management, pricing, legal, and technical/operational teams. This review breaks the RFP down into proposal sections and highlights any issues we may have in answering the proposal. It is usually combined with the kick-off conference call.

The Red Team review goes over the final version of the proposal. This is usually performed by the Proposal Manager and the Account Team, and sometimes includes the Executive staff of the Sales or Support organizations.

A major review usually occurs as the pricing is completed on large proposals, and is attended by executives from the sales organization, technical organizations, and Sales Support. The Proposal Development Group is part of Sales Support. This review focuses on pricing, contractual, profitability, or execution issues.

- We do not have the usual hierarchy of a traditional center. Everyone has to know how to do any job that is of a lower pay grade than his or her position. In other words, you should know how to set up conference calls and format and edit because with our volume you may end up having to do these things yourself. The Proposal Coordinators do some lower level Proposal Management. In some of the traditional centers I have seen and worked in, that might cause a class revolt from higher-level managers.
- While we have reviews, they are not traditional red team ones. Since the proposal and account teams are not collocated, we rarely have face-to-face meetings.
- All of our boilerplate, second tier boilerplate (more technical, less generic), and reuse databases (we call ours the Q&A database) reside in our Proposal Research Center, which is located in both the VPC (Virtual Proposal Center) and on the server. Both locations are accessible through dial-up or the telework program. There is almost no difference in accessing these tools, either in the office or off-site. There is a very slight delay while in the telework program; there is a more noticeable delay when using dial-up. However, downloading documents, especially large ones, may give you the sensation of feeling your hair growing when you are in a dial-up mode.
- Almost all meetings are teleconferenced—whether they are strategy, status, or our version of red team. Most of our staff meetings have proposal staff dial in via conference calls. We do not spend much time sitting in the same room together.
- Only if the timeline is longer, does any of this change—and even then, this change is proportionate to the complexity of the document to be modified and the amount of modification required. If it is a very large team and a large RFP, we may start out with a basic status matrix just to keep us on track. Once the document reaches about a 70 percent completion, we usually leave the status matrix and revert to document tracking.

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What We Have Learned About Teleworking

Is there a downside to teleworking? Yes. If you are not disciplined enough to keep business "business" and personal "personal," then you will find yourself working more than you normally do, because work is always right there. For those with smaller houses and no spare bedrooms, you could find work sitting right in the middle of your dining room, your living room, or … SIGH… your bedroom. If you are a workaholic, who thinks if you could get just one more thing done you would not have to worry in the morning and suddenly find yourself still working at midnight, then you may have to really think about teleworking. If you are a very sociable person used to taking mid-morning or afternoon coffee breaks and standing around in the break room and socializing, then you may not be cut out for teleworking. Also, teleworking probably is not for you if at the end of the day you have not accomplished much because you were distracted by Oprah, the laundry, and the kids.

During my years of managing teleworkers, I have had three problems with my teleworking employees. I had one employee who thought it was fine to go on long lunches and shopping expeditions with her friends, then dump work she should have been doing on the Proposal Coordinator. But more commonly, managers are faced with two other, more insidious problems: managing workaholics and actually getting your teleworkers to come into the office for meetings or to pick up their mail. Actually, just getting them to leave their house to do anything may be a problem.

At one point, when WebVan (a grocery delivery service) was in Atlanta, I rarely left my home office at all unless I had a doctor's appointment. Managing workaholics is really the larger problem and since being a workaholic seems to be epidemic among the proposal people that I know, it is a more prevalent problem. Telling your employee that they have to stop working after a 14-hour day should not be difficult, but when you are talking to someone at home, trying to finish one last thing, it is.

The only other social problem is getting neighbors, friends, and family to understand that just because you are home, that does not mean you are available for drop-ins or babysitting. Working from home means you are working. After two years of full-time teleworking, my family and friends now ask "Are you working?" when they drop by or call. Since I have caller ID/call waiting and voice mail on my home phone, I rarely answer the home phone when I am working. You'd be amazed how many telemarketers call your house during the day when you are not there!

Having a Normal Life Again

I find my productivity goes up about 50 percent when I am able to work from home. No distractions from the office social butterflies, no one dropping by to see if I have seen so-and-so, or the latest report. No one-and-a half hour Atlanta commutes to and from the office. I work in shorts and a T-shirt in the summer, and sweats in the winter. Taking a break in the middle of the day to go walk in the bright summer weather, and coming back refreshed to work on your proposal again is a great stress buster. Saying "Hi Honey, how was your day?" to your children when they come home from school is a wonderful feeling, especially for those of us who have missed so much of our children's lives in the past because we were working so many long hours at the office.

The most common complaint heard about teleworkers is that you can not see them working, so how do you know if they are? It is quite simple: they produce more work. Also, for people in the proposal industry, the reason that they are successful as teleworkers is the same reason that they are successful as proposal managers: their sense of ownership, self-motivation, and the fact that they are deadline-driven. Teleworking can give your proposal managers something that they may miss the most: quality of life.

Teleworking In Your Business

A checklist of queries and tips:

Tish Wilson, a Bell South Senior Proposal Manager, at work in her home office.

- Many telecommunications companies offer teleworking packages to their customers. Check with your local phone and long distance companies to see if they offer work-at-home packages. Compare prices and benefits.
- If you have a choice in buying hardware, buy laptops to enable your proposal professionals to take their laptop home with them in the evenings.
- Power cords, keyboards and mice are fairly inexpensive and it makes a world of difference when working at home if you are able to set up a separate keyboard and mouse for the laptop. You may have to buy a splitter to use both keyboard and mouse. Having a set at work and a set at home lightens the briefcase and lessens the stress load.
- If an employee has a PC at home, let him or her load your software on it. Many corporate site licenses let you load the software on a home PC.
- Consider subsidizing or partially subsidizing a second phone line, or if your company allows connection via the Internet, a DSL line at your employee's home.
- If you have any sway with your IT or Telecom group, see if they will allow the employees to dial into a higher speed modem or if you can securely connect via the Internet.
- If you have not moved toward decentralization of your proposal resources, look at your office to see if you can. Try to start moving away from paper draft copies and more toward electronic copies, which you can e-mail easily.
- Check to see if your teams are already using teleconferencing for virtual or off-site team members. Consider enlarging this so employees can call-in from their desks and continue working on their PCs.
- As long as your employees can access files and have them available to all team members, teleconferencing is as efficient and fiscally sound as face-to-face conferences.

The Future of Teleworking

As the teleworking industry evolves, we are expecting to move to faster technology in the coming years. DSL connections have opened new avenues for faster and more efficient technology. At BellSouth Business, as budget permits, we are moving more and more employees onto laptop computers with dial-in capability, to allow them to telework whenever possible. It is not unusual to call an employee's work phone and hear that they are teleworking for the afternoon or entire day. It has become an acceptable alternative workplace strategy at BellSouth, and such a part of our corporate culture that Telecommuting has it is own Web page on our Intranet. The Web page explains the corporate philosophy and the official program.

Signs on the expressways extol gridlocked motorists to telework to reduce smog.

As the local, state, and federal government agencies here in Atlanta struggle with air quality standards that affect our ability to get federal funds for improving our roads, teleworking is increasingly becoming a public issue. Signs on the expressways extol gridlocked motorists to telework to reduce smog. Public service announcements praise the benefits of teleworking.

Telecommuting has been a success for the BellSouth Business Proposal Development Group, and a larger success for BellSouth. BellSouth has used teleworking internally as a way to provide overhead cost savings to the company and increase employee satisfaction with their working life. Externally, the BellSouth telework program helps BellSouth promote cultural change, demonstrate our role as a telecommunications leader, and confirm our commitment to the environment. For our Proposal Development Group, it has become a way of life.

Lessons Learned

Managing Telecommuters

- Watch for signs of depression or isolation in your employees. Teleworking is not for everyone. If you see a decline in productivity over a period of time in a valued employee, pull the employees back in for a few days and talk with them honestly. It may be that they miss the socializing and being with people.
- Watch for signs of goofing off. Productivity slacking off is one sign, another is an employee not being accessible via phone or e-mail. One bad employee can spoil your entire telework program. If you have a troublesome employee at work, telework is probably not the answer for them. If an employee needs to be supervised, that person is not a candidate for telework.
- Ask your employees to be virtually apparent. Logging in and saying good morning to their workgroup and talking about what you will be working on that day is similar to what we do in the office in the mornings. I ask my employees to log out when they go to lunch. “Off to lunch, back in an hour” is a sample message. Again, I remind people that this is very similar to what they do verbally in the office.
- Ask them to come into the office at least one day a week to circulate and be seen, pick up their mail and go to lunch with coworkers. It helps keep your face recognizable.

Personal Experiences

- Try to find an area in your house away from most of the traffic. Spare bedrooms are great, but dining rooms are great places, too. Try not to use your master bedroom. Some areas should be sacrosanct.
- Try to stay on a set work hour schedule. It is easy to end up working all day and night if you do not discipline yourself early on.
- Educate family and friends when you are working. I printed signs to stick on the door to let them know when I could not be disturbed, such as during conferences or when I am writing.

Telecommuting: Facts and Figures

In the US, telecommuting is changing the face of society:

- According to the Bureau of Labor Statistics, in 1997 more than 21 million employees in the US worked from home, usually ad hoc, either finishing up work at home or completing calls. The vast majority of these were working at night or on the weekends, completing work that they did not get done during the day at the office.
- According to a recent report from the International Telework Association & Council (ITAC), an estimated 16.5 million US employees worked from home one day a month. At least 9.3 million US workers telecommute at least one full day a week.
- A Gallup Poll in 2000 showed 8 million people teleworking full-time.
- The Gartner Group believes that there will be more than 137 million people teleworking in some way by 2003.
- The federal government has an initiative to have approximately 3 percent of its workforce teleworking by 2002.

Corporate Rationale for Telecommuting

Companies are looking more and more to telecommuting as a way to cut costs, be good corporate citizens, and become a place that people want to work. Companies such as AT&T, BellSouth, and Hewlett Packard have studied and published papers on telecommuting, and their studies have shown that productivity increases when these programs are offered to key employees. Studies also show sick leave diminishes with teleworkers, because minor illnesses such as colds, while making a person miserable enough not to want to drive into work, does not keep telecommuters away from their computers. Case studies by National TDM and Telework Clearinghouse show study-after-study of large companies (including AirTouch Cellular, Electronic Data Systems, Hewlett Packard, and 56 other companies) declaring similar benefits:

- Improved quality and productivity
- Rapid disaster recovery
- Effectiveness gains
- Emergency coverage
- Retention of top performers
- Increased work/life satisfaction
- Increased employment of those with disabilities
- Enhanced employee effectiveness
- Enhanced recruitment, retention, and employee satisfaction

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BellSouth Business Proposal Development Group Snapshot

- The Proposal Development Group handles state and local government and commercial proposals for network and equipment products and services. A separate entity—Federal Systems Division—handles most federal proposals.
- There are three distinct groups:
  - — The Network Group handles network transport and multi-entity proposals—frame relay, local phone service, etc. The Network Group has four Senior Proposal Managers.
  - — The Equipment Group handles telecom equipment proposals—PBX, switch, etc. The Equipment Group has five Bid Support Managers who handle equipment design engineering and pricing solutions and two Contract Managers who review legal requirements and the Terms and Conditions of the RFP.
  - — The Operations Group handles processes for all three groups, proposal coordination, and production. The Operations Group has five Proposal Coordinators and two Proposal Specialists.
- The Proposal Development Group offers the following services:
  - — Technical Responses (design/engineering/pricing of equipment)
  - — Proposal Management (writing/editing/project management of complex proposals)
  - — Proposal Coordination (project management of simple proposals, proposal coordination and production for network and equipment proposals)
  - — Terms and Conditions Review (contract management and legal review.)
- Products offered:
  - — Proposal Generator: intranet-based proposal generator. Since inception in 1998, more than 16,000 proposals have been generated.
  - — Virtual Proposal Center—implemented in 2001.
- In 2000, the Proposal Development Group completed 289 proposals. As of July 2001, it had completed 235 proposals.

- Higher-quality work
- Improved customer service
- Increased attendance and willingness to work overtime
- Office space and travel savings
- Expanded coverage across time zones
- Improved cross-training and teamwork
- Alleviated parking crunches.

You can read about case studies on teleworking by these and other companies at National TDM and Telework Clearinghouse's Web site at http://www.nctr.usf.edu/clearinghouse/casetelework.htm

What Companies Have Telecommuting Programs?

With the federal government's telework initiative, teleworking has become a serious workplace alternative. A partial list of companies with formal and informal telecommuting programs can be found at June Langhoff's Telecommuting Resource Center at http://www.langhoff.com/companies.html, but it should not be considered definitive. BellSouth Business has a formal telework program for its employees as well as a service that they offer to their business customers, in conjunction with a third party vendor. BellSouth also offers advice to small business and home workers on teleworking, at its Web site http://www.bellsouth.com/homeoffice/evaluate/resources.html.

Most large companies embark on telecommuting programs by working with consultants and experts to help set up their programs. These programs usually are set up with formal, legal agreements to protect the company and the employee.

How Much Does It Cost?

Costs vary depending on how formal a program the company wants. Formal programs such as Hewlett Packard and BellSouth Business run cost approximately \$3,500 - \$4,000 per employee, which includes the phone line (usually ISDN or DSL), equipment and IT support. Most companies find the telework programs cost about half what it would be to house and set up a new employee in an office. Also, according to Gil Gordon, Telecommuting Consultant, the payback period for recouping technology costs is less than one year. AT&T also offers a Telework program, and their Web site has an excellent Telework Benefit Analysis tool at http://www.att.com/telework/getstart/gs_buscas_a.html.

For More Information On Telecommuting

Gil Gordon Associates offers advice and tips on telecommuting. This firm is considered the guru of teleworking. Please see www.gilgordon.com.

June Langhoff's Telecommuting Resource Center is a great site for telecommuters, giving advice and information on telecommuting at http://www.langhoff.com.

BellSouth's TeamTelework Program, please see http://www.bellsouth.com/business/products_services/solutions_telework.html.

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RFP Response Mapping and Compliance Identification

Companies lose potential government and commercial contracts because they are not organized to respond to and comply with all instructions and specifications in the Request for Proposal (RFP). David Herndon shows the remedy for this problem.

By DAVID H. HERNDON

Companies lose potential government and commercial contracts every day. Yet these same companies may offer the best products, the lowest costs, or the lowest risk to the customer. Information describing these features may be in their proposals, but not organized in a way that sells the firm's tangible and intangible benefits to the customer. One of the major reasons why proposals offering winning benefits lose is that they are not organized to respond to and comply with all instructions and specifications in the Request for Proposal (RFP).

Response mapping, an important part of the initial RFP analysis process, is used to develop a comprehensive RFP-to-Proposal Response Matrix. This matrix is the key to developing a winning proposal. It is the basis for developing the proposal's overall organization, outline, and section numbering system. Proposal review teams and customer evaluators use the Response Matrix as a basic tool to verify that the proposal responds to the RFP instructions and specifications.

Evaluators universally like response matrices.

Whether the proposal is for a government agency or a commercial organization, being responsive to and compliant with the RFP has been key to successful proposal development for many decades. For example, in a 1977 survey of two dozen US Air Force, Army, Navy, and NASA proposal evaluators, Bob Dycus reported that these evaluators universally liked response matrices. In addition to telling them where to look for the answers to their RFP questions, response matrices gave the evaluators a warm feeling that the contractor had addressed all RFP requirements (Dycus, 1977). During the last 25 years, similar comments have often been heard during proposal debriefings.

When organizing your proposal, the main objective is to make it as easy as possible for evaluators to find the answers to their questions. This can help gain maximum evaluation points. In fact, the main purpose of an RFP-to-Proposal Response Matrix is not to provide a map so the evaluators can find answers, but rather to help your authors write such a logically and obviously organized proposal that the evaluators will not even need to refer to the Matrix!

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Responsiveness versus Compliance

The terms "responsiveness" and "compliance" are often confused and used interchangeably. Responsiveness is related primarily to the topical organization of the proposal and whether each requested RFP topic has a proposal response. Compliance relates to whether the proposal responses meet specific RFP qualifications or specifications.

If any individual resumes in the proposal do not meet these specifications, the section is not compliant with the RFP requirement.

Stated another way, responsiveness means that the proposal responds to, or discusses—in the proper order—the various topical areas requested in the RFP. Compliance, on the other hand, means that the bidder complies with the RFP's specification-related requirements for the service or product to be provided. For example, assume that an RFP specifies that the proposal must have at least four major sections (Past Performance, Technical Approach, Management, and Key Personnel) and the proposal contains these four sections; the proposal would then be responsive to this requirement. However, assume that in the requirements for the Key Personnel Section the RFP specifies certain educational and experience minimums for each key person. If any individual resumes in the proposal do not meet these specifications, the section would not be in compliance with the RFP requirement.

A proposal may address every RFP requirement and yet not meet every specification. If any specification appears to be totally illogical and difficult or impossible to accomplish, the offeror may respond with a reason for not meeting the specification. Hopefully, the customer would find this reason acceptable. However, such a response would be noncompliant and therefore should be justified in terms that benefit the customer.

When to Perform Response Mapping and Compliance Identification

The best way to ensure a proposal is responsive to RFP instructions and requirements is to develop an RFP-to-Proposal Response Matrix. This matrix maps instructions from the various RFP sections and provides a matrix used to develop the proposal structure and outline. During RFP analysis and the development of the RFP-to-Proposal Response Matrix, a separate list should also be prepared as an aid to compliance identification. This list identifies the requirements or specifications to which each proposal section must comply.

Some government and commercial organizations use numbering schemes that are different from the traditional C, L, and M sections.

Response mapping covers all RFP sections that relate to proposal requirements. Compliance identification covers all RFP areas that relate to specifications concerning the contractor, products, methods, or performance. In Federal Government RFPs, the major sections normally used for mapping include Section L, Instructions for Proposal Preparation; Section M, Proposal Evaluation Factors; and Section C, Statement of Work. There may be other RFP sections such as specifications, appendices, legal clause sections (Sections G and H), special proposal instructions, and attachment lists which can also be used. While some government and commercial organizations use numbering schemes that are different from the traditional C, L, and M sections, the same methodology is used to prepare the Response Matrix and identify compliance items. To resolve any inconsistencies or conflicts within the RFP, the normal hierarchy for proposal organization is Section L, Section M, SOW, specifications, and then any other sections.

Response Matrixes and compliance lists should be prepared for both the technical and cost volumes.

Initial response mapping and compliance identification should be performed as early as possible after receiving the draft RFP or, in lieu of this draft, after a strawman RFP has been prepared in-house. As many draft RFPs do not contain proposal instructions (Section L) or proposal evaluation factors (Section M), these missing sections should be estimated from intelligence and previous RFPs from the same customer. Storyboard development or proposal section writing should never begin without a comprehensive RFP-to-Proposal Response Matrix and a list of specific specifications to which the bidder must comply. Comprehensive RFP-to-Proposal Response Matrixes and compliance lists should be prepared for both the technical and cost volumes. This ensures that all required elements needed for the cost proposal are identified, and helps the proposal manager retain control of the cost volume's organization if this volume is prepared by another group.

Before preparing any RFP-to-Proposal Response Matrix entry or identifying any compliance requirement, the proposal manager must carefully read the RFP to become familiar with its general requirements. The proposal manager should then reread every page, highlighting every RFP section, paragraph, and statement relevant to the proposal's content. The proposal manager should also highlight any detailed specifications related to contractor qualifications, services to be performed, or final products. The analysis of large, highly technical solicitations covering many different areas may require additional support from subject matter experts to evaluate the specifications and ensure the bidder can comply.

A phone call to the contracting officer resulted in the five-year requirement being changed.

If areas of potential noncompliance with specifications are identified, they should be addressed immediately. If solutions cannot be quickly developed to mitigate these areas, the applicant should consider either a no bid decision or a teaming arrangement. Minor noncompliance areas caused by obsolete or illogical RFP requirements can usually be solved by asking questions and suggesting requirement changes to the customer. For example, in

Figure 1. RFP-to-Proposal Response Matrix Shell

Name of Customer RFP Number				Name of Bidder Proposal for (Name of Proposal)	
Evaluation Factors	Proposal Instructions	SOW	Other RFP Sections	Proposal Section Number	Proposal Section Title

a recent RFP, the contractor was required to be "incorporated for at least five years." The contractor had only been incorporated for three years, but had an excellent track record. A phone call to the contracting officer resulted in the five-year requirement being changed to "an established company."

Developing the RFP-to-Proposal Response Matrix

This and subsequent sections primarily pertain to the development of a basic RFP-to-Proposal Response Matrix. Information and examples of compliance identification are provided as appropriate.

Step 1: Develop a basic RFP-to-Proposal Response Matrix Shell

The first step is to develop a RFP-to-Proposal Response Matrix shell. As the proposal evaluation will usually be based on Section M evaluation factors, these factors should be in the shell's the first column. Proposal instructions (normally from Section L) are placed in the second column, and statement of work items (normally from Section C) go into the third column. The fourth column is usually reserved for all other referenced RFP sections. Proposal instructions from some government agencies have strong requirements to follow Section L exactly. In these cases the first column should be Section L, and the second column should be Section M. Some commercial solicitations do not have specific sections for instructions, work statements, and evaluations. Everything may be included within the general specifications. In these cases, the Section L, M, and C equivalents must be identified and put into their proper columns. Figure 1 shows a typical RFP-to-Proposal Response Matrix shell.

Step 2: Establish a Top-Level Outline of the Proposal Structure

The second step is to establish a top-level outline of the specific proposal structure. This can usually be derived from the Section L proposal instructions. For example, a hypothetical RFP for Diving Tender Maintenance and Repair Services from the National Underwater Marine Agency might include RFP instruction L.23.a(4), which states that proposal sections must include Past Performance, Technical Approach, and Management; RFP instruction L.23.a(5), adds an additional requirement for a section on Staffing. Further review of this hypothetical RFP's Evaluation Factors reveals that RFP Section M(4).1 provides high-level proposal evaluations as follows:

- M(4)1.A – Past Performance (40%)
- M(4)1.B – Technical Approach (20%)
- M(4)1.C – Management (20%)
- M(4)1.D – Staffing and Key Personnel (20%)

Entering these top-level numbers and titles from Sections L and M into the matrix shell results in the beginning of the proposal organization. Since most proposals should begin with an Executive Summary, add this to the matrix also. The matrix shell developed in step 1 above now begins to take shape (see Figure 2). Be aware that the corresponding RFP section titles in one or more sections of the RFP may not be exactly the same. In the above examples, the section on staffing in L is called "Staffing" while its corresponding section in M is called

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Figure 2. Response Matrix Shell Containing Top-Level Title Headings from Proposal Sections M and L.

National Underwater Marine Agency RFP #123-456-789				Top Value Marine Services, Ltd. Proposal for Diving Tender Maintenance and Repair Services	
Evaluation Factors Section M	Proposal Instructions Section L	SOW Section C	Other RFP Sections	Proposal Section Number	Proposal Section Title
					Executive Summary
M(4).1.A	L.23.a(4)				Past Performance
M(4).1.B	L.23.a(4)				Technical Approach
M(4).1.C	L.23.a(4)				Management
M(4).1.D	L.23.a(5)				Staffing And Key Personnel

"Staffing and Key Personnel." Use your best judgment when determining which name to use in these cases. If the titles are similar but one is more inclusive (Staffing versus Staffing and Key Personnel), it is normally preferable to use the more inclusive title (Staffing and Key Personnel).

If the RFP requirements are not numbered, topical headings can be substituted. When the requirements are very simple, using topical headings may be better than using RFP section numbers.

Various RFP sections may at times appear to have little or no interrelation, or completely different requirements and topical headings. This is often found in proposals from civilian agencies, such as the National Institutes of Health and the US Postal Service. When this happens, the various topics must be interwoven in a logical manner to cover all requirements. When doing this, make sure that the proposal instructions (Section L) are not violated, unless there are additional instructions that state otherwise. In a recent US Postal Service RFP, for example, proposal instructions were contained in a single sentence that requested three volumes: technical, management, and cost. However, Section M stated that two volumes would be evaluated based on a list of specific topics, and that the proposal had to be prepared in the exact order requested in Section M subsections. The technical and management requirements in these subsections were very detailed, and were mixed together rather than divided into the two volumes requested in the instructions. A call to the USPS contracting officer resulted in the comment, "just follow Section M."

If the RFP requirements are totally contradictory, send questions to the originating organization and obtain clarification.

Step 3. Develop a Proposal Numbering System

The third step is the development of a proposal numbering system. Matrix numbering can be simplified by moving commonly held Section M and L number components into the column heading. Once this is done, a proposal numbering system can usually be developed from the remaining Section L or M components. In the illustrated example, it is obvious from the Section M column that the major proposal sections can be alphabetical (see Figure 3). In this example, the Executive Summary does not have a proposal section number.

The proposal numbering system should be as simple as possible. However, you should keep as many number levels as necessary during initial RFP response mapping to ensure all RFP requirements are identified. In its early stages, the proposal numbering system may therefore go as deep as six or more digits. Because any proposal numbering system more than four digits deep is difficult for reviewers to follow, you should eliminate section numbers above four digits before the proposal goes into Red Team draft.

Numbers that closely follow the evaluation factors are the easiest for reviewers to identify: unless otherwise directed by Section L, use a proposal section numbering system based on Section M factors to significantly aid the evaluators reviewing the proposal. Alphanumeric numbering is easier to follow than decimal or alphabetical systems, and should be used when possible. If the RFP requires a discussion of topics that appear to be outside the Section M headings, my recommendation is to force them under a Section M heading. If any heading and paragraph number is not linked to Section M, the topic may not receive evaluation points because the evaluators have no place defined in their Source Selection Plan instructions for scoring them.

Step 4. Add Section C Top-Level and any Subordinate Requirements

The forth step is to add Section C top-level and subordinate requirements; any subordinate requirements from RFP Sections L and M; and any other RFP sections or attachments that relate to the proposal. Requirements from other RFP sections are often important, and must be identified in the Response Matrix. When adding these subordinate requirements, indent the proposal section titles. Showing relative subordination in the matrix's proposal section title column helps create the proposal outline.

A simplified, first draft RFP-to-Proposal Response Matrix is illustrated in Figure 4. The completed RFP-to-Proposal Response Matrix maps all RFP requirements into the proposal outline and numbering system. Matrixes for large RFPs may be many pages in length. After completing the first draft of the matrix, the proposal manager should review the RFP again to ensure that all applicable RFP sections are mapped to a proposal heading/subheading. During this review, add or modify other numbers, headings, and RFP references as required.

Figure 3. Example of Simplified Numbering System for Response Matrix

National Underwater Marine Agency RFP #123-456-789				Top Value Marine Services, Ltd. Proposal for Diving Tender Maintenance and Repair Services	
Evaluation Factors Section M(4.1)	Proposal Instructions Section L23.a	SOW Section C	Other RFP Sections	Proposal Section Number	Proposal Section Title
					EXECUTIVE SUMMARY
A	(4)				PAST PERFORMANCE
B	(4)				TECHNICAL APPROACH
C	(4)				MANAGEMENT
D	(5)				STAFFING AND KEY PERSONNEL

Section/volume leads and subject matter experts should review for compliance, and raise issues that may have been missed.

The proposal manager should always prepare the response matrix's first draft. After this draft is completed, the proposal core team (volume/section managers, etc.) should review it and recommend any additional subheadings or other modifications. During this review, section/volume leads and subject matter experts (if any) should also review relevant items for compliance to requirements, and raise issues that may have been missed during the initial RFP analysis.

The completed RFP-to-Proposal Response Matrix draft is now ready to use as a tool to prepare preliminary proposal storyboards. On very small proposals, experienced proposal professionals can use the matrix as their guide for writing the proposal directly. For example, the writer responsible for preparing proposal section C.5, Quality Control, can easily determine which areas of the RFP contain relevant requirements and potential compliance items. Figure 4 shows these relevant RFP requirement areas are:

- RFP Evaluation Factor, Section M(4)1.C.5
- RFP Proposal Instruction, Section L.23.a(4)
- Statement of Work, Section 1.7
- RFP Section H.22
- RFP Attachment 7.

more...

Figure 4. Sample of a Completed RFP-to-Proposal Response Matrix

National Underwater Marine Agency RFP #123-456-789				Top Value Marine Services, Ltd. Proposal for Diving Tender Maintenance and Repair Services	
Evaluation Factors Section M(4.1)	Proposal Instructions Section L23.a	SOW Section C	Other RFP Sections	Proposal Section Number	Proposal Section Title
					EXECUTIVE SUMMARY
A	(4)		H.17		PAST PERFORMANCE
A.1	(4)			A.1	Corporate Experience in Similar Work
A.2	(4)		Attach. 1	A.2	Referenced Contracts
A.2	(4)			A.2.1	USCG Small Craft Vessel Repair
A.2	(4)			A.2.2	DEA Enforcement Vessel Repair
A.2	(4)			A.2.3	USCS Patrol Vessel Repair
A.3	(4)			A.3	Applied Contract Cost Reduction Methods/Results
A.4	(4)			A.4	Awards and Honors for Accomplished Work
B	(4)	1		B	TECHNICAL APPROACH
B.1	(4)	1.1		B.1	Understanding the Problem
B.2	(4)	1.2		B.2	Repair and Maintenance Evaluations
B.3	(4)	1.3	Attach-2	B.3	Obtaining Repair Parts
B.3	(4)	1.3.1	Amend-2	B.3.1	Engine and Mechanical Parts and Supplies
B.3	(4)	1.3.2		B.3.2	Electronic Instrumentation Parts and Supplies
B.3	(4)	1.3.3		B.3.3	Other Parts and Supplies
B.4	(4)	1.4		B.4	Scheduling Work around NUMA operations and Ensuring Fast Turnaround
B.5	(4)	1.5		B.5	Emergency, Non-scheduled Repairs
B.6	(4)	1.6		B.6	Final Inspection and Certification
C	(4)			C	MANAGEMENT
C.1	(4)			C.1	Corporate Management and Oversight
C.1	(4)		L.18	C.1.1	Corporate Financial Commitment to the Program
C.1	(4)		H.19	C.1.2	Corporate Resources Available to the Program
C.2	(4)			C.2	Program Management
C.2	(4)			C.2.1	Program Management Organization
C.2	(4)			C.2.2	Program Management Authorities and Responsibilities
C.2	(4)			C.2.3	Reporting and Deliverables
C.3	(4)			C.3	Contractor-Customer Interfaces
C.4	(4)	2		C.4	Program Startup and Phase-in
C.5	(4)	1.7	H.22, Attach-7	C.5	Quality Control
D	(5)		G.15	D	STAFFING AND KEY PERSONNEL
D.1	(5)			D.1	Numbers and Types of Personnel to be Used
D.2	(5)			D.2	Recruiting, Providing, and Retaining Personnel
D.3	(5)	1.8	H.5	D.3	Key Program Personnel
D.3.a	(5)	1.8(a)	H.5	D.3.1	Program Manager
D.3.b	(5)	1.8(b)		D.3.2	Deputy Program Manager
D.3.c	(5)	1.8(c)		D.3.3	Maintenance Operations Supervisor
D.3.4	(5)	1.8(d)		D.3.4	Supply Supervisor
D.3.5	(5)	1.8(e)		D.3.5	Quality Control Supervisor
D.3			Attach-4	Appen-A	RESUMES OF KEY PERSONNEL
C.5				Appen-B	QUALITY CONTROL PLAN

The RFP-to-Proposal Response Matrix must be a living document during the entire proposal process. During storyboard development, proposal team members may determine that additional proposal subheadings are required to accommodate detailed solutions, discriminators, themes, competition analysis, and other factors. If such subheadings are added or modified, the changes should be immediately incorporated into the matrix by the proposal manager/coordinator, and updated copies should be distributed to the entire proposal team. The proposal manager should approve all matrix changes, and only changes that directly relate to specific RFP requirements should be made. Changes should not be made to any proposal section or paragraph specifically required by the RFP, because such changes could make the proposal non-responsive or noncompliant to Section L.

In addition to the matrix columns shown in Figures 1 through 4, other columns can be added to assist proposal developers. These columns might include Evaluation Criteria Value, Page Limitations, Author Assignments, or Proposal Status. Such additional columns are especially important if storyboards are not prepared and the Response Matrix acts as the primary guide for proposal preparation.

SSEB panels and sub-panels must review both Sections L and M in relation to their assigned proposal sections.

DoD proposal organization must follow RFP Section L, Instructions for Proposal Preparation. As a first check before actual proposal evaluation, DoD evaluators often assess whether the proposal organization follows these instructions. If it does not, the entire proposal can be disqualified with no further evaluation. Because DoD proposals are frequently separated at Section L-specified sections for distribution to various Source Selection Evaluation Board (SSEB) panels and sub-panels, it is imperative to follow Section L. A well-organized DoD proposal will also directly correlate all Section L instructions with Section M Evaluation Factors for Award, as the SSEB panels and sub-panels must review both in relation to their assigned proposal sections. The importance of this approach was illustrated in 1988. At a meeting with USAF Aeronautical Systems Center top-level contracts officials, one official announced: “In the RFP Section L we tell you what we want you to tell us about your proposed program. We don’t care whether you even mention the SOW. Unless you take exceptions to the SOW, you’ve got to do it all, anyway, once you sign the contract — even if you don’t mention it in your proposal!” (Ransone, 1988).

Response Structure and Compliance Reviews

The proposal’s overall response structure and compliance to RFP specifications are major areas that should reviewed as early as possible during proposal development. A review team should determine if the RFP-to-Proposal Response Matrix was prepared correctly, and if the bidder can comply with all instructions and specifications identified in the matrix. If the RFP-to-Proposal Response Matrix is correct, the review team can use it as a tool to answer the following questions:

- Is the overall proposal outline structure correct?
- Do storyboards cover all required RFP topics and comply with all RFP instructions, evaluation factors, SOW items, and other RFP requirements?

Early review of the response matrix and storyboards can ensure that the proposal outline structure is accurate and that “sell items” are present. Getting these items right at the beginning of the effort eliminates major problems often found during late Red Team reviews of the complete proposal (Herndon, 2000). I highly recommend the use of the storyboards as a step between response matrix development and proposal section writing. Section authors can review relevant solicitation sections identified in the matrix and then summarize, in text format, the exact topics and solutions to be covered in their section discussions. In addition, authors can identify additional specifications to which the bidder must comply, and discuss how these specifications will be met.

Evaluation teams and authors work significantly faster and more effectively using a comprehensive RFP-to-Proposal Response Matrix.

I have found that proposal review and evaluation teams and authors work significantly faster and more effectively when they use a comprehensive RFP-to-Proposal Response Matrix. Without this matrix, review teams usually have to spend time constructing some kind of tool to help them determine if the proposal is responsive and going in the correct direction. In addition to aiding the review team, a robust and accurate RFP-to-Proposal Response Matrix helps authors:

- Prepare storyboard outlines
- Identify subtopics for lower levels of indenture
- Review storyboard outlines for compliance to RFP requirements
- Ensure the most effective level of detail in the best scoring location is provided at storyboard review
- Establish paragraph page budgets at storyboard review
- Ensure that existing drafts respond to the RFP and do not waste pages on unnecessary topics
- Ensure that related topics are consistent.

Automated RFP Parsing and Response Matrix Systems

Because most RFPs are now available in electronic format, proposal consultants often prepare response matrices using Excel rather that the Microsoft Word approach illustrated in this paper. However, using Word allows additional data manipulation into different formats, and using Access or other database software can provide additional flexibility. Most commercial proposal development software packages available today include database software that will automate RFP-to-Proposal Response Matrices and storyboard outlines (Wilson, 2001). These automated systems are particularly helpful for analyzing large, complex RFPs. When using proposal development software, the proposal manager usually assigns RFP sections to a basic outline derived from Section L or M, and sorts all RFP requirements into this outline.

Additional subheadings are then assigned as needed. Automated systems enable the incorporation of whole RFP requirement text into the matrix, rather than just the RFP section numbers. This makes the text available for authors to study in the context of their proposal outline assignments. The ability to incorporate full text also enables automated systems to generate comprehensive storyboards that are fully responsive to RFP requirements.

A number of proposal automation products are described in the Spring 2001 issue of the *Journal of the Association of Proposal Management Professionals* (Wilson, 2001). They each have different purposes and provide different functions. The only one with which I have personal experience (and know works as advertised) is Proposals Organized to Win (POW) 2000™ by Ransone Associates, Inc.

The steps used by automated software for developing an RFP-to-Proposal Response Matrix are similar to the manual method described above. They include (1) identifying the RFP requirements to be addressed in the proposal; (2) defining the proposal outline; and (3) mapping the RFP requirements to the proposal outline. To accomplish the first step, some automated RFP parsers include algorithms that (so it is claimed) identify all requirements in the RFP that must be addressed in the proposal. They do this using logic searches for words (e.g., "must," "shall," and "will"), or punctuation (e.g., period followed by a double space or double carriage returns).

There are too many inconsistencies for algorithms to work reliably.

I believe there are too many inconsistencies among RFPs, and even within single RFPs, for such algorithms to work reliably. The programs I prefer let the proposal manager determine which RFP requirements are important and where they should be assigned. These programs, such as POW 2000™, provide a quick and easy way to map requirements to the proposal outline, and a quality check to identify any RFP requirements that have been missed. The resulting RFP-to-Proposal Response Matrix and its reciprocal Proposal-to-RFP Response Matrix are "live," and can be used during proposal writing to maintain control over proposal section compliance with RFP requirements.

Supporting the Customer's Proposal Evaluators

Including a comprehensive RFP-to-Proposal Response Matrix at the end of the Executive Summary can be a major aid to the proposal evaluators. In a severely page-limited proposal, the matrix can be included in several ways: a page number column can be added to the matrix, which can then be included before the Executive Summary in non-counted pages, or the matrix can be placed at the end of the proposal on 11" x 17" foldout sheets so that it can always be open during proposal review.

As an aid to the evaluation process, the response matrix is helpful in several ways:

1. It provides a detailed requirements list of all relevant RFP sections, and maps and illustrates where these items are answered in the proposal.
2. It shows the customer that the proposal sections are provided in the required order.
3. It supports the development of a formal evaluation plan, if the customer does not have one.
4. It provides a checklist the evaluator can use to verify the inclusion of all RFP topics.
5. It can even help the evaluator identify items omitted from your competitors' proposals.

Anecdotal evidence bears this out. In proposal debriefings I have attended, the evaluators have often commented on the value of the RFP-to-Proposal Response Matrix. Common comments include, "everything was where we wanted to see it;" and "you covered all the topics that we wanted you to discuss."

Adding in-text references to the RFP response or compliance requirement can also be helpful. Such references can be included immediately after the paragraph title, but are more commonly included in the narrative for obscure solicitation requirements to bring them to the reviewer's attention.

Conclusion

RFPs frequently specify a proposal organization that conflicts with the way the contractor wants to tell its story — but the customer has the money, so the customer makes the rules! The reviewers will evaluate your proposal against the evaluation factors, and they want to find your answers to their questions as easily as possible. If you want your program to be considered fairly, follow the RFP's instructions and requirements. The best way to ensure that you have made it as easy as possible for the evaluators to choose your firm and its product or services is to prepare a response matrix that strictly agrees with the RFP, and to follow it carefully.

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Net-Working the Web

The Internet has not only changed the way we work; it has created new opportunities for proposal professionals who go into business for themselves. In this article, Peter J. Ognibene, an independent proposal manager and writer, describes how to leverage the immediacy and connectivity of the Web to find assignments and improve the way you work. He shares his own experience as a personal case study.

By PETER J. OGNIBENE

In 1995, I became an independent consultant with two principal lines of business, smart card technology and proposals for information technology and telecommunications companies. As a VP of corporate development for a firm that specialized in smart card applications, I wanted to continue working with that niche technology even though I knew I could not make a living on smart cards alone. The market for smart cards was then, and remains, limited and narrow. Or, as one wag put it: "Smart cards are the technology of the future—and always will be."

My experience in corporate development centered on managing and writing proposals. So, when I went into business for myself, it made sense to emphasize that experience.

"My little enterprise managed to wobble its way into the air before I ran out of runway"

To drum up business, I began networking the old-fashioned way—calling colleagues and acquaintances and sending letters to CEOs, marketing VPs and proposal center directors. In my first six months, I made numerous contacts, got positive feedback but had little in the bank to show for it. Then, I wrote a winning proposal for a smart card project, which led in turn to a position managing the project. Though the takeoff roll seemed long at the time, my little enterprise managed to wobble its way into the air before I ran out of runway.

1995 was also the year I first signed on the Internet. I used it for e-mail, quick research and file exchanges. The Internet was still so unusual that I recall looking for, but seldom seeing, Web addresses on TV ads. Today, of course, one cannot imagine any enterprise, large or small, without a Web site.

When I started, my principal technological tool was mail merge, which I used to generate seemingly personalized letters to managers who, I fervently hoped, might need help with proposals. With the rise of the Internet, mail merge has become for me as much an anachronism as the old DOS prompt. Though meeting face-to-face remains the most effective way to convince a prospect to become a client, the power of the Internet to match buyers and sellers makes it a marketing tool unlike any other.

For the business executive or proposal center director who wants someone smart, experienced and *now,* nothing beats the Internet. I still get some business from people with whom I worked in the Antiquarian Age (*viz.,* before the Web), but close to 90 percent of my revenue in recent years has resulted from contacts first made through the Internet.

The Internet is many things, but its two most salient characteristics are *immediacy* and *connectivity.* Learning how to leverage those characteristics is essential to succeed as an independent proposal professional.

Immediacy, or You Want It—I Got It

Ask yourself if you're doing enough.

You met the marketing and proposal executives; they liked your work but did not have anything for you just then. A month or two has passed. With everyone "multi-tasking" and "moving at Internet speed," chances are their neurons no longer spark with fond recollections of that meeting. Your impressive résumé drowned in the tsunami of paper that has since swept across their desks. Your tickler e-mail stands forlornly in a queue with dozens of other messages, unopened or DOA (deleted on arrival).

Yes, the Internet can serve as a high-speed substitute for phone calls and letters, but it is much more than that. To exploit the immediacy of the Internet, you need a presence on the Web. So, when decision-makers need someone just like you, it's *you* they will find.

Creating a presence on the Web takes time and thought; the technology makes it easy. I set up my Web site in December 1996 and typically get 15-20 hits a day. The site focuses on smart cards, but I often direct potential clients seeking a proposal manager or writer to the site. They can browse my articles and presentations and take their measure of my ability to analyze management and technology issues and propose solutions. Your site should demonstrate *what* you know rather than expound the manifold wonders of you to a waiting world.

In addition to your own site, use job-related Web sites that allow you to post résumés. If you have multiple specialties, post multiple résumés. These sites also let you search for openings that

more...

match your skills and locations where you are willing to work. Simple criteria, such as the word "proposal" and two-letter state abbreviations, are what I typically use. On Monster, DICE or HotJobs, I get many irrelevant hits, but it is easy to sort through them and click open only those with job titles of interest.

Job Search Agents are the most powerful feature on these sites. They automatically search for jobs and send you an e-mail of positions that match your search criteria.

Getting Started as an Independent

Whether you should go solo I leave to you, your significant other, and your financial or spiritual adviser. If you do, you will find three options. They are not mutually exclusive: you can select one or mix and match among the three—whatever works best for you. This is, after all, *your* business.

Option One: You're On Your Own

Building one-to-one relationships with prospective clients means you must do the marketing, contracting and billing. With this approach, the rewards are higher rates and stronger bonds with your customers. The drawbacks include administrative chores and downtime while you are drumming up that next assignment.

Most of my experience has been as a solo practitioner. As one proposal nears completion, I look ahead to the next job. Some magically materialize—an e-mail or phone call from a previous client or someone who learned of me from a colleague or saw my résumé on one of the employment-related Web sites. When the magic does not happen, I respond to proposal-related ads on those Web sites until something clicks.

Option Two: You've Got An Agent

Some consultants prefer to work through agencies or recruiters, and the practice has its advantages. A number of large corporations avoid solo consultants. For some, it is a make-or-buy decision: they would rather pay to have a specialist sort through multiple prospects and single out the top candidates. Others are concerned with potential hassles regarding consultants who, in the eyes of the IRS, might look more like employees than independent contractors. Many larger corporations, however, are reducing the number of agencies and recruiters they use to recruit proposal professionals.

Whatever the reason, these companies prefer to work through agencies even though the hourly rate for your services may go up 40 or more percent as a result. If you abhor the thought of marketing yourself—unavoidable in Option One—this may be your best bet. Personally, I am a pragmatist: I will take the first solid offer no matter where it originates.

Option Three: You're a "Cog" in a Great Proposal Machine

Readers of *PROPOSALManagement* will find a number of ads from companies that specialize in proposals. In addition to placing managers, writers and editors in proposal assignments, these firms offer methodologies covering every aspect of proposal creation. With some, you don the fig leaf of a "W-2 employee" for tax purposes; with others you remain an independent contractor. If you have solid skills but want to broaden your experience, the "credentials" you might gain working with such firms could enhance your marketability. These companies typically have contracting vehicles such as purchase orders, master agreements, and consulting agreements in place with clients. These vehicles enable them to bring new people on board quickly.

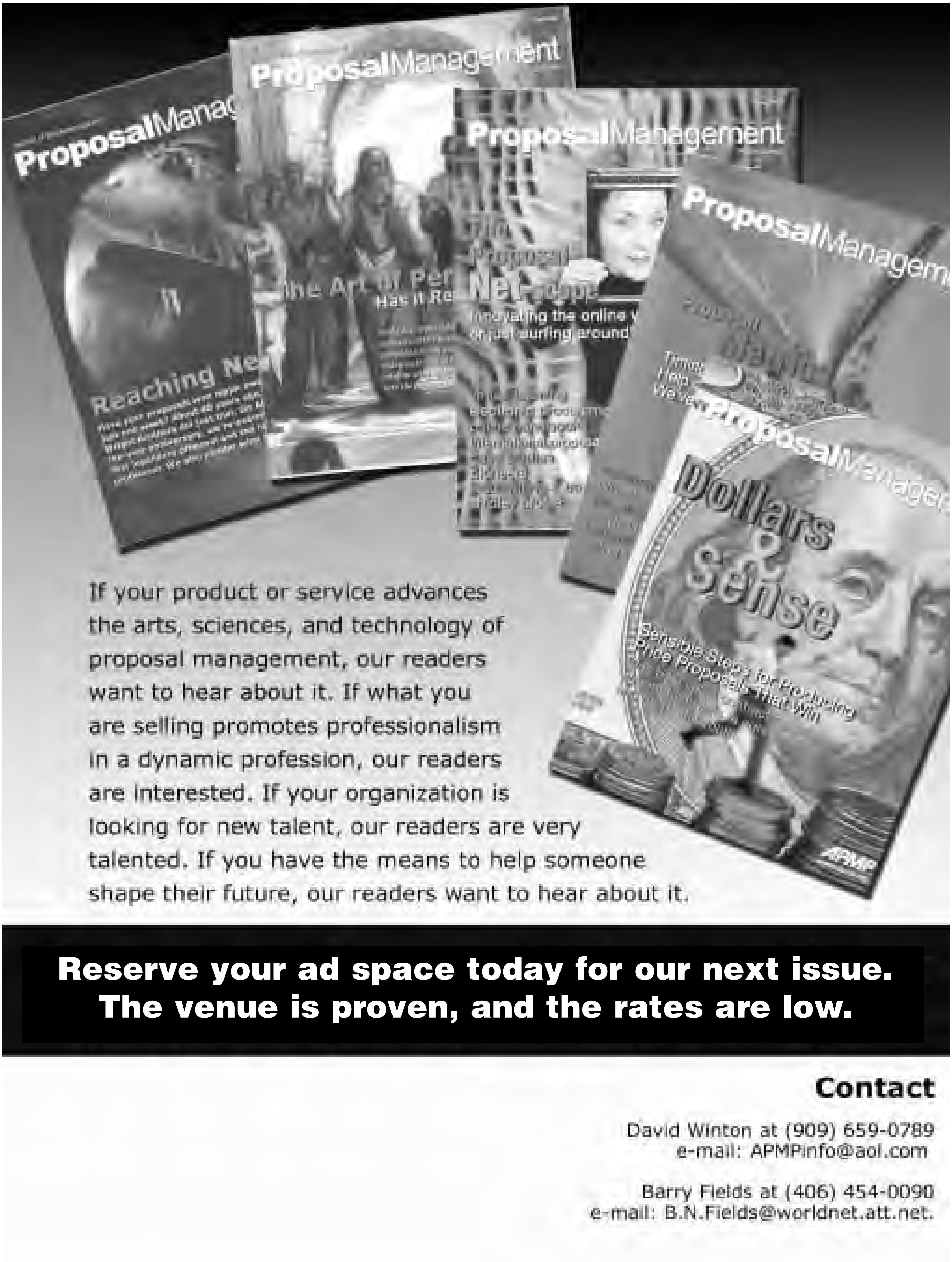
The high hourly or daily rates these firms charge tend to restrict their customer base to large corporations. The rates they pay proposal professionals, by contrast, are considerably less than you might make under Options One or Two. When the economy is hot, these firms can keep you *very* busy, allowing you to accumulate in hourly billings what you might otherwise lose through a lower rate. Let the economy hit an air pocket, as it did at the start of 2001, and you may well lose altitude.

Peter J. Ognibene is an independent proposal consultant who specializes in information technology and telecommunications proposals. He can be reached at 301-434-8572 and PJSmart@aol.com. His Web site is http://members.aol.com/pjsmart.

Putting the Web to Work for You

Here (in alphabetical order) are some employment-related sites I find useful. Unless otherwise noted, these sites allow you to post résumés and use job search agents that notify you by e-mail once a day of assignments that match your search criteria.

APMP	The APMP Web site has a relatively small job bank, but all the slots are for proposal professionals, which makes it a good place to start. Because the site lacks job search agents, you need to return periodically to see new listings.	**http://www.apmp.org**
CareerExchange	This site allows you to search by job title as well as ad content, which is a helpful option most sites lack.	**http://www.careerexchange.com/searchjb.htm**
CareerMagic	Good listings, mostly on the East Coast, but you need to go to your Jobs "In-box" to see them. Search agents provide job titles but little detail.	**http://www.careermagic.com**
DICE	Mostly for engineers, programmers and other techies, but IT proposal opportunities frequently turn up.	**http://www.dice.com**
HeadHunter	A useful site, but you need to go there to use it.	**http://www.headhunter.net**
Hot Jobs	In terms of quality, this site has some of the best jobs posted on the Internet.	**http://www.hotjobs.com**
Job Sleuth	This service searches multiple employment sites according to your search criteria and sends you daily e-mails for openings that match.	**http://www.jobsleuth.com**
Monster	Always worth a visit, Monster may have the largest number of listings, but their quality is spotty compared to HotJobs.	**http://www.Monster.com**
Net-Temps	Oriented toward contract assignments, the site also lists full-time employment.	**http://www.net-temps.com**
Yahoo! Classified	Set up your own Yahoo site, post one or more résumés and have these "Classified Ads" search on your behalf. You must go to the site to use them.	**http://my.yahoo.com/?myHome**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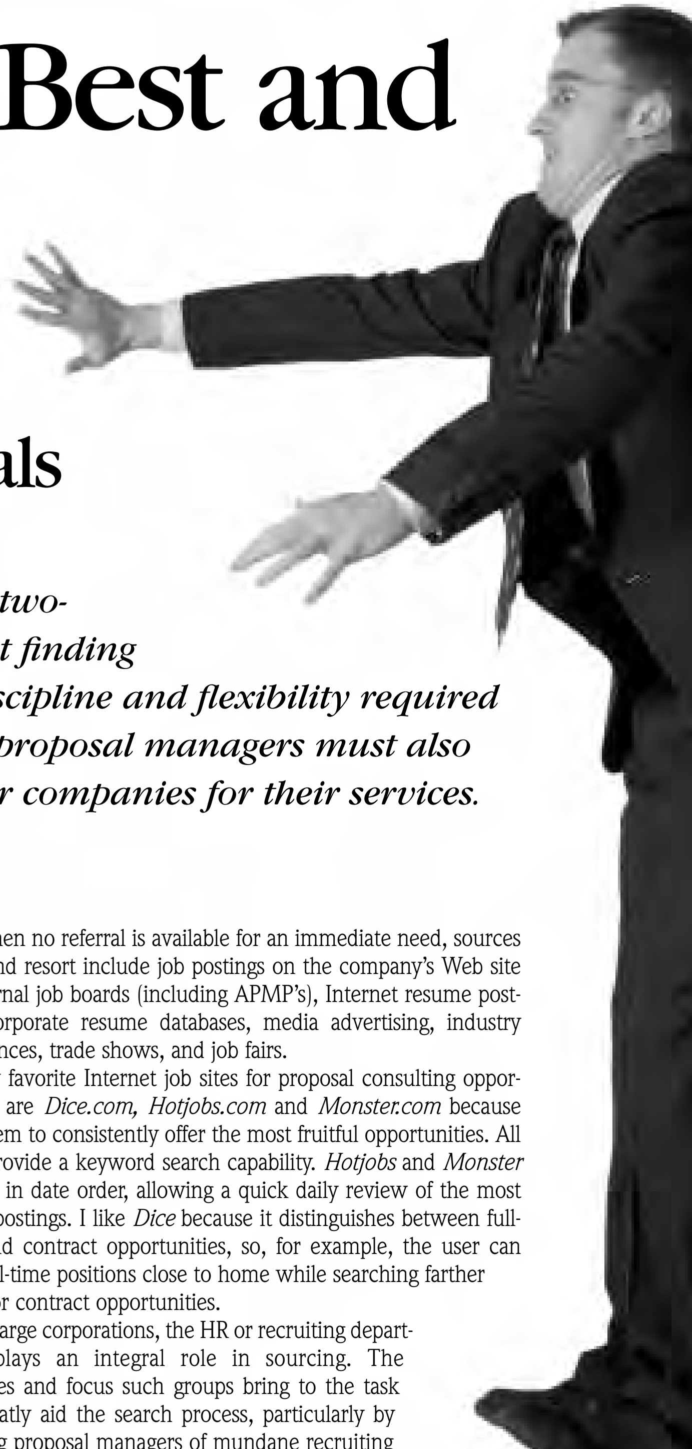
Article

Bidding for the Best and the Brightest:

Recruiting and Hiring Top Quality Proposal Professionals



Hiring top-quality proposal professionals presents a two-pronged challenge. As if it were not hard enough just finding qualified people with the highly specialized skills, discipline and flexibility required to make it as proposal professionals, recruiters and proposal managers must also attract the best and brightest while out-bidding other companies for their services.

By JON SISKIND

Sourcing

Proposal talent can be identified in a variety of ways. Far and away the most reliable source, yielding a high rate of successful hires in virtually any industry, is referrals from current and former employees. Referrals work because a referral implies an endorsement, putting one's reputation on the line to some degree, and because most people will not recommend someone with whom they would not want to work.

A common means of getting the right people to the right proposal opportunities is word-of-mouth referral within the proposal community. Most of my relationships with proposal consulting suppliers have resulted from such leads. Earlier this year I was somewhat amazed to have one supplier give me the names of three of its direct competitors to call about contracting opportunities.

A common means of getting the right people to the right proposal opportunities is word-of-mouth referral within the proposal community.

When no referral is available for an immediate need, sources of second resort include job postings on the company's Web site or external job boards (including APMP's), Internet resume postings, corporate resume databases, media advertising, industry conferences, trade shows, and job fairs.

My favorite Internet job sites for proposal consulting opportunities are *Dice.com, Hotjobs.com* and *Monster.com* because they seem to consistently offer the most fruitful opportunities. All three provide a keyword search capability. *Hotjobs* and *Monster* list jobs in date order, allowing a quick daily review of the most recent postings. I like *Dice* because it distinguishes between full-time and contract opportunities, so, for example, the user can seek full-time positions close to home while searching farther afield for contract opportunities.

In large corporations, the HR or recruiting department plays an integral role in sourcing. The resources and focus such groups bring to the task can greatly aid the search process, particularly by relieving proposal managers of mundane recruiting tasks, thus freeing them to concentrate on managing the proposal effort. However, as Bill Painter of Shipley Associates found when working for a large defense contractor, corporate HR departments can take considerably longer to find qualified people.

A good recruiter will also network for referrals among contacts in the proposal community. In some organizations, recruiters concentrate in specific skill areas in order to cultivate relationships, network, and stay abreast of business and technological developments in their respective areas. One in particular, an information technology (IT) staffing firm where I was engaged as a proposal consultant, organized its recruiting efforts by technology sector. Each Resource Manager specialized in one of five markets and was responsible for developing relationships

with consultants at all levels in that arena. Similarly, the recruitment of proposal professionals might be segmented by proposal job function, such as managers, subject matter experts, writers, graphic artists, editors, production specialists, etc.

Many companies cultivate a corporate philosophy that "everybody recruits."

The job of finding good people need not be limited to the recruiting organization. At Shipley Associates, for example, Regional Sales Directors act as an extension of the recruiting function and have been highly instrumental in recommending good proposal consultants. In the normal course of interacting with their clients, they often pick up information about imminent layoffs or employees approaching retirement. They pass these "leads" on to recruiters. Consultants on billing at client sites may play a similar role. In fact, many companies cultivate a corporate philosophy that "everybody recruits" and back it up with a referral bonus plan as an important component of the employee benefits package.

Evaluation

Who are "the best and the brightest" and how do you know when you have found one? Naturally, desired star qualities will vary depending on the specific proposal position being filled. Some roles may require extraordinary project or people management skills, while others might call for outstanding writing or editing capability. Specific industry or technical expertise may be essential in some contexts but merely nice to have in others.

Computer literacy and facility with software tools have become mandatory.

Regardless of the situation, however, all proposal professionals should have a solid understanding of generic proposal methodology and an innate sense of competitive strategy. Computer literacy and facility with software tools have become mandatory for most proposal project roles as well. Says Alan Snodgrass of Shipley Associates, "Many companies have eliminated their technical publications departments, so there is no one to call upon for desktop publishing, graphics help, etc." Without properly preparing for such a situation, he adds, "nasty things happen sometimes" when the consultant is faced with "going it alone."

Perhaps most important, top-quality proposal professionals

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are take-charge self-starters who are willing to do whatever needs to be done to complete the proposal on time with the utmost quality. They are team players who have a "can-do" attitude and can perform under eleventh hour pressure. They are willing and able to do many tasks at the same time. As one long-time industry professional put it, they "need to be pizza eaters, especially after the Red Team comes in." When Alan Snodgrass hears comments from a candidate such as "it sure was lonely on weekends at the client's facility," he knows he has a live one. In the view of Mike Ianelli of MJI Associates, the best and brightest possess leadership qualities and the ability to help others perform well. For some proposal managers, qualitative factors may be more important than the dollar value of program awards won.

A proper evaluation of a candidate's proposal skills and experience needs to be multidimensional. It uncovers not just what the person has worked on, but what specific roles and tasks he or she has undertaken and how these roles were performed. Lou Robinson and Gene Dawson of Winning Proposals try to determine if the person has been directly or just peripherally involved in proposals, how often, and whether the involvement covered the full proposal life cycle or a single phase. According to Mike Ianelli, all of this needs to be considered in the context of where the person got his or her experience, how disciplined a process was in use in that environment, and how the company used its proposal group (that is, for business development vs. writing and editing vs. production). Finally, it is important to find out what roles the applicant *prefers* to play.

Qualifying an applicant means not only evaluating the candidate's competence and skills, but also assessing "fit" for the position and the company. For example, in many companies the proposal culture demands an extraordinary degree of flexibility in one's lifestyle. A person's willingness to travel and to work long nights and weekends may be a critical factor in determining his or her suitability for the job. A proposal consulting supplier may also look for people who can develop new business for the firm. As a first step in the qualification process, Shipley Associates sends a detailed questionnaire to new consultant candidates covering such topics as consulting strengths and weaknesses, proposal and technical skills, areas of specialization, assignment preferences, and travel and other personal constraints.

Resumes and supporting questionnaires, while a necessary first step in the screening process, only go so far in qualifying an applicant. For writers and editors, writing samples may be used to evaluate proficiency. Most effective, of course, are in-person interviews, which provide a two-way dialogue stressing interpersonal and communication skills. An interview enables both parties to ask questions, offer unsolicited information and sell themselves. It also allows the interviewer to ask "how would you handle…," or situational questions that assess confidence, experience level and how the candidate thinks. Finally, only in a face-to-face meeting can both parties begin to determine whether they like each other and would enjoy working together, even though it may be difficult to assess compatibility without first-hand knowledge.

References also play a critical part in evaluating an applicant. Winning Proposals values the reference check so highly they typically contact five references before making a hiring decision. My current employer, Project One, in addition to checking the references provided by the candidate, frequently does a "one-off" reference check with a contact provided by one of the candidate's references.

Some Key Questions a Proposal Professional Might Ask in an Interview (beyond "What's in it for me?")

What are you looking for from me that will address a need or deficiency you currently have?

What is your role in the organization? What will our working relationship be?

Do you subscribe to a methodology or process?

Do you maintain repositories of text for reuse?

What is the measure of success for this position?

What does it take to be successful in this environment?

What does the company (or proposal group) do well? What is the company's competitive advantage?

What are some of the challenges the company (or proposal group) is facing?

I'd like to meet someone from the sales organization as part of the hiring process. Can that be arranged?

What is the basis for paying consultants, upon submission of time sheets or after receiving payment from the end-client?

In addition to verifying competence and experience, references provide invaluable information about the person's professionalism in terms of work ethic, reliability, attitude, commitment, attendance, and integrity. Likewise, only someone who has worked directly with the applicant can truly characterize his or her interpersonal and communication skills, leadership skills, ability to function as part of a team and handle conflicts, and ability to function under pressure and meet deadlines. For me, response to the ultimate reference-check question, "would you hire this person again if the opportunity arose?" is one of the most telling indicators of future success.

Evaluation need not end with the hiring decision. Periodic or end-of-engagement performance reviews provide a means of ongoing evaluation and continuous improvement. As a consulting director, when determining whether and how to reuse people on subsequent engagements I value managers' and clients' insights about consultants' strengths and areas for improvement. Client managers are generally eager to provide this information and appreciate that the supplier has taken the time to solicit their feedback.

Some Key Questions an Interviewer Might Ask (beyond "How much money are you looking for?" and "Are you available to work anytime anywhere?")

How many proposal efforts have you been involved in?

What was your largest proposal effort in terms of number of volumes, number of people on the proposal team, and length of time taken to produce the proposal?

What was your role on your last proposal project?

What tasks did you perform?

How did you do them?

Describe the methodology or process that was used.

What was the win strategy?

How did you plan and schedule work tasks for the team (or yourself)?

How was the proposal group used in that company?

What role(s) do you like to play?

Do you prefer to work in a team or on your own? Why?

What software tools are you familiar with?

Why are you looking to leave your current position?

What are you looking for in your next job/assignment?

What do you enjoy about proposal work? What are you passionate about in your work?

What do you like least about proposal work?

Courtship

It is essential that the candidate be given as thorough an understanding as possible of the role and the hiring organization. The candidate needs to learn about the position's day-to-day activities, scope of responsibility, expectations, accountability, upward and downward reporting relationships, interdepartmental interactions, problems and challenges, management philosophy, and corporate culture. Any information the applicant can be given about proposal center facilities, Virtual Proposal Networks (VPNs), automated tools, repositories of reusable text, etc., should be especially useful to someone deciding to accept a new job or to stay put.

I want a candidate who shows an interest in these things. The interviewee's questions (or lack thereof) about the job and the company, along with his or her level of comfort and enthusiasm, are often indicative of whether the person will ultimately succeed. Someone who asks too many questions about the latest automated tools, for example, may not be happy in a less sophisticated shop. On the other hand, someone who is less "spoiled" by technology might either welcome the growth opportunity or be intimidated by the change. In either case, such a person would have a greater learning curve once on board.

It pays to take time throughout the recruiting cycle to understand the person's aspirations, passions and hot buttons.

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Equally important, the "recruiting/hiring team," composed of everyone who speaks with the candidate during the recruiting process, must probe to develop an understanding of the candidate's needs. What drives the person? What is it about proposal work that the person loves, despite the grueling pace and personal hardships? Why is the person looking to leave his or her current position? What will it take to get the person to join the company? It pays to take time throughout the recruiting cycle to understand the person's aspirations, passions, and hot buttons. Only by doing so can you hope to present an offer package that truly satisfies the candidate's needs, once you've decided to hire the person.

One recruiting approach does not fit all. What works for hiring permanent employees may be less effective for proposal contractors. Permanent employees are interested in a steady paycheck, fringe benefits, prestige, perks, training, and opportunities for career advancement. Perms also tend to be more concerned about job security (although corporate life in recent years has made security as elusive at large corporations as in the consulting world).

None of these things typically interest a contractor. Contractors, or freelancers, have more of a mercenary attitude than applicants for permanent positions. Some seek long-term assignments in order to maintain continuous billing. For others who are turned on by variety or who want to limit the duration of their out-of-town assignments, longevity may be less of a priority. Retirees, who have increasingly joined the ranks of independent consultants in recent years, may have different needs and constraints than younger professionals building their careers. While all freelancers like the money they can make as consultants and are concerned about downtime, the smart ones realize that a certain amount of non-billable time is part of the deal and account for it in their billing rates.

Consultants like the professional recognition from clients and peers that comes with success.

Freelancers also tend to view their careers as a succession of "gigs." Career growth is likely to be perceived not as movement up the corporate ladder but as the accomplishment of new, enriching experiences with different industries, new technologies, different types of programs, new contacts, or larger program awards – all of which enhance the consultant's marketability. Consultants like the professional recognition, from both their clients and their peers, that comes with success. They thrive on personal satisfaction gained by building their own successful consulting practices.

Clearly, not everyone is cut out for consulting, either employee-based or freelance. Some consultants I have managed could never get comfortable with the consulting life - moving from assignment to assignment at different client locations and always coming into new situations, usually under extremely high-pressure conditions, behind the learning curve, unproven yet expected to deliver superior results quickly. Others seemed born for it. Such individuals have different needs and are enticed by different attractions. They prefer working on project-based assignments, with a distinct beginning and end, rather than being locked into an ongoing corporate function. They thrive on the variety and the challenge of the consulting life. And they like being shielded from corporate politics, enjoying that feeling of having "one foot out the door" when the political climate becomes too oppressive.

Proposal

Attracting and winning top-quality proposal professionals requires a first-rate effort. A compelling bid is more than a formal letter documenting a generous compensation package and benefits. It is the opportunity to learn and to enhance one's resume. It is the promise (using the term with extreme caution) of performing challenging and satisfying work in a well-managed, team-oriented, productive environment. It is the potential to grow and to attain new experiences and successes.

A winning bid must be supported by a quality presentation. An attractive offer package alone may not be enough; the professionalism of the recruiter, the hiring manager and other interviewers may also figure significantly in the candidate's decision, as may the professionalism of the interview process and facilities. Just as the quality of a proposal exemplifies the quality of work a client can expect once a proposed program begins, so the corporate "face" presented during the recruiting process should serve as a sample of the professionalism, fairness and responsiveness with which employer-employee relations are conducted.

A professional recruiting and hiring process features such common courtesies as timely response to questions, issues, concerns, and especially voice mails and emails. It also requires proper pacing— maintaining mutual enthusiasm and keeping the competition at bay while allowing adequate time for a comprehensive, two-way vetting process. As a hiring manager, try to create opportunities for the candidate to meet with prospective peers and perhaps with your boss as well.

A professional recruiting and hiring process also needs to be conducted with honesty and integrity. I find that the benefits of leveling with a candidate about a company's imperfections before hire usually outweigh the risks of doing so. Such candor helps to set reasonable expectations, enhances my credibility, and allows me to manage from a basis of trust.

Above all, the recruiting/hiring team must be able to articulate and sell the benefits of coming on board, fine-tuning them to the particular candidate. Such discussion might include:

- What's good about the company?
- What's distinctive about its products and services and about its culture?
- Why do people enjoy working there?
- What are some of the problems and challenges facing the company and how are they being addressed?
- What's new and exciting?
- Where is the company headed?

This kind of first-hand information goes beyond the platitudes typically found in the corporate brochure or Web site. When delivered persuasively, enthusiastically, and face-to-face, this is the stuff that can really turn the candidate on to the opportunity and clinch the deal. In the final analysis, people are most likely to join a company where, in their gut, they feel they *want* to work.

This expands upon an earlier article which appeared in the APMP Perspective newsletter for Summer 2001.

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Article

Nineteenth Century Contracting Foibles in the Building of America's Canals

Pre-Civil War canals pioneered in the development of a new relationship between the government and the economy, for they could not have been built without a combination of state support and private enterprise. But when canals invited competitive bids from construction companies, both parties discovered that promoting the public interest and making profits might not be compatible goals.

Building America's Canals

Canal construction opened up massive new markets and created job opportunities for thousands of common laborers and skilled professionals. Canals were America's first modern business enterprises in terms of their scale of capitalization, mobilization of labor, and bureaucratic management. They served as a corporate model for railroad companies to emulate.

They also pioneered in the development of a new relationship between the government and the economy, for canals could not have been built without a combination of state support and private enterprise. Canals were a new kind of business entity in pre-Civil War America because they combined the promotion of the public interest with corporate gain.

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By JAYME A. SOKOLOW, Ph.D.

July 4, 1828, was a bright and sunny day in Washington, DC. Early that morning, President John Quincy Adams and other political dignitaries breakfasted in Georgetown and then took boats about five miles upstream on the Potomac River to Little Falls. A large crowd was there to greet them at the official groundbreaking ceremony of the Chesapeake & Ohio Canal, which its directors dreamed would link the nation's capital with the Ohio River in Pittsburgh and thus make Washington, DC a great entrepot for western trade.

After the usual fanfare, President Adams spoke briefly and then tried to break the ground with a shovel. But his spade struck a root. He tried a second time and failed again. With great aplomb, Adams calmly put down his shovel and removed his coat. As the crowd roared its cheers of encouragement, Adams thrust his shovel into the ground and succeeded in dislodging some dirt. The construction of the Chesapeake & Ohio Canal had officially begun.

John Quincy Adams, like many other Americans, was an enthusiastic supporter of canals. Canals, their supporters tirelessly argued, would extend the benefits of republicanism to all parts of the Union and promote prosperity. By 1860, there were 4,254 miles of public and privately constructed canals in the United States, more than in any other country in the world.

National Park Service, photographer E. B. Thompson

The Chesapeake & Ohio Canal (believed to be 1859)—Canal boat no. 32 passes through Lock no. 15 in Maryland, northwest of Washington, D.C.

Although the national government partially supported the construction of some canals, most states followed the example of New York and built their canals through a combination of state appropriations and public stock subscriptions. Other canals, such as the Sault Canal, were built by private companies, often with special state corporation privileges and lotteries.

Once canal companies had incorporated, appointed a board of directors, hired engineers and surveyors, sold stock subscriptions, and determined a canal route, they all faced a daunting challenge. They needed to find competent building contractors because none of them had the staff or the expertise to undertake canal construction on their own. Even privately built canals had to subcontract their construction work. Finding reliable government contractors was as problematic then as it is today.

Credit: Shaw, Ronald E. *Erie Water West: A History of the Erie Canal, 1792-1854.* Lexington, KY: University Press of Kentucky, 1966, p. 295.

The Erie Canal at West Troy, 1830

Bidding for Canal Contracts

Canal building technology and engineering expertise did not exist in America at the beginning of the 19th century. The canal company solved this problem by importing British civil engineers, who taught Americans how to build canals. The canal company also developed the Bid and Proposal process that was used by other canal companies throughout the United States.

When construction on the Erie Canal began in 1817, there was no single construction company in the United States to build the entire canal and the state of New York had no public works department or canal workforce. At the same time, the New York canal commissioners feared turning canal construction over to private companies. "Too great a national interest is at stake," they intoned. "It must not become the subject of a job, or a fund for financial speculation."

Necessity forced the Erie Canal Company to divide the canal route into small sections and to bid each section competitively. Thus, the canal commissioners found themselves in the exact situation they had feared. The Erie Canal would become a lucrative source of jobs and profits. Public funds would promote private enterprise.

To assist potential bidders, the canal company announced what amounted to a Request for Proposals that included the following information:

- A brief description of each section, including the section length.
- A Statement of Work that included clearing land, excavating and building embankments, and building towpaths, fences, culverts, and locks.
- Piece rates of $.10 to $.14 cents per cubic yard of excavation with higher fees for marl ($.75 per cubic yard) and rock ($2.00 per cubic yard).
- A completion date.
- An approval mechanism for completion of the contract. Contracts stated that an Erie Canal superintending engineer had to inspect and approve all works before contractors received payment. Before payment, each contractor's section of the canal was filled with water, and any leaks had to be repaired at his expense.
- A requirement that all contractors had to guarantee their lock construction for five years.
- A payment mechanism. After construction had been inspected and approved, contractors would receive payment.

In the first RFP competition, more than 50 companies won contracts to build the first 58 miles of the canal. Construction bids included no provision for indirect costs.

Contracting Foibles

The biggest problem contractors faced was accurately calculating the cost of canal labor, the major budget item in every proposal. About 80 percent of canal construction costs were directly related to labor. Construction companies had to pay workers a daily wage, house and feed them, and usually provide them with a standard dram of whiskey at the end of the work day. The other 20 percent of construction costs were allotted to management, tools, and equipment.

At first, canal construction seemed quite lucrative to working class New Yorkers. In 1818, a Welsh laborer near Utica reported that "wages on the canal are one dollar a day and thirteen to fourteen dollars a month with food and washing and half a pint of whiskey a day. Those who provide their own food, wet and dry, get twenty-two to twenty-three dollars." Wages on the Erie Canal were comparable to those laborers could earn in other kinds of manual work.

But Erie Canal workers, who numbered 9,000 by 1821, worked 12-hour days in both good and bad weather and were unemployed during the winter months when freezing temperatures curtailed construction. Most of the monotonous, backbreaking work was done with old fashioned picks and shovels, although dynamite was used to blast rocks, and tree stumps were often removed by a metal device drawn by a team of horses.

Gunpowder explosions and collapsing locks and canal beds maimed and killed laborers. Canal workers, who often lived and worked in highly unsanitary conditions, also were felled by cholera and other diseases.

In addition, wages fluctuated throughout construction. Daily rates were high when construction boomed and workers were difficult to recruit, but they declined when construction slowed down or there were too many qualified job applicants.

Not surprisingly, many construction companies made very low bids to win contracts. When they found their labor costs escalating, they had to choose among two courses of action. One involved paying lower wages to workers, reducing their workforce, or, in some cases, delaying the payment of wages or paying only partial wages.

Credit: Gray, Ralph D. *The National Waterway: A History of the Chesapeake and Delaware Canal, 1769-1985.* Urbana, IL: University of Illinois Press, 1989, p. 259

The Chesapeake and Delaware Canal at Delaware City, Delaware

The other involved requesting additional money in the settlement of their contracts. Some claims were legitimate, but others were not, leaving one canal engineer to complain that "it was by no means rare for ingenious contractors to swell these claims to large amounts."

The Erie Canal's construction problems resurfaced in the building of the Chesapeake & Ohio Canal. After John Quincy Adams's speech, canal engineers laid out 34 sections above Little Falls. Contractors, many of whom had worked on other canals in the United States and Canada, submitted 462 proposals to complete the first section of the canal.

Despite detailed instructions in the Request for Proposals similar to those used in Erie Canal contract competitions, winning contractors encountered predictable problems. Many companies made unrealistically low bids and found themselves in the unenviable position of scrambling to find laborers and then paying to feed and house them. On top of that, work was frequently disrupted by floods, accidents, the national cholera epidemic of 1834, labor strikes, and ethnic violence between Irish and German laborers and among Irish workers.

In 1834, the Chesapeake & Ohio Canal teetered on the edge of bankruptcy and had trouble paying its contractors. Workers feared, in the words of a contemporary, "either the suspension of work, or of payment, on one or more sections of the canal." They started rioting, used violence to exclude other laborers from remaining jobs, and physically threatened contractors. It took federal troops, the Maryland militia, and the payment of back contracts to restore calm. Between 1834 and 1840, there were ten serious labor disturbances, all caused by Company's financing of contractors.

Some Chesapeake & Ohio Canal contractors never completed their contracts or fully paid their laborers. Others found that the scarcity of workers, at least in the early years of canal construction, forced them to pay higher wages than they could afford. In response, they subcontracted their work at prices below the original bid so they could make a profit.

Many of these problems were caused by the divergent interests of canal boards and contractors. Canal boards wanted to secure faithful and responsible construction companies that would "finish their jobs as low as labor and capital can afford," personally supervise their work, and assume all the risk of financial failure. Put simply, they wanted work done as cheaply as possible without falling below acceptable standards of quality.

Contractors, on the other hand, wanted to make a profit, which meant strictly controlling labor costs, the major expense in canal construction. Not surprisingly, canal laborers were caught in a vice between parsimonious canal companies and employers whose profit margins were sustained by low wages.

During the pre-Civil War era, unskilled labor became an increasingly low-paid form of employment for the young and mostly single men who built America's canals. While some canal laborers experienced upward economic mobility and became foreman or better paid skilled workers, most drifted from job to job with no hope of advancement.

Too often laborers went hungry, lost their livelihoods, had trouble collecting their wages, turned on each other, or attacked contractors for mistreating or bilking them. It is a miracle that 4,254 miles of public and privately constructed canals were completed in the United States by 1860.

The More Things Change...

At the heart of all these problems was the Bid and Proposal process on America's canals. Beginning with the Erie Canal, canal boards were determined to find contractors that would complete their work on time according to specification at minimal cost because they feared turning their canals into a financial boondoggle for the private sector. This led them to accept unrealistic cost proposals, which then created subsequent contractual problems.

When the Alexandria Canal Company put out a Request for Proposals in 1832 to build an aqueduct spanning the Potomac River to connect the Chesapeake and Ohio Canal with the Virginia shore, it received bids ranging from \$99,092 to \$247,090. A firm won the contract to build the aqueduct's cofferdams because one of its owners had served on the Board of Engineers of the Chesapeake and Ohio Canal. The firm subcontracted its work, but the Alexandria Canal Company voided the contract because the subcontracting did not meet its specifications.

The Chesapeake and Delaware Canal, which connected the Chesapeake and Delaware Bays, had similar problems. The final cost of the canal—\$2,201,864 in 1824—was more than 80 percent higher than the original estimate because the swampy land at both ends of the canal was difficult to excavate. Only a timely \$300,000 Congressional subsidy signed by President James Monroe on his last day of office saved the canal's contractors from financial ruin.

Credit: Hahn, Thomas Swiftwater, and Emory L. Kemp. The *Alexandria Canal: Its History and Preservation.* Morgantown, WV: West Virginia University Press, 1992. p. 34.

The Alexandra Aqueduct, 1868

Today, national and state governments are more solvent and responsible than 19th century canal companies, and there are laws and labor unions to protect workers from many of the iniquities they experienced during the Canal Era. Nevertheless, the divergent interests of canal boards and contractors in pre-Civil War America are still mirrored in the relationship between

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government agencies and contractors today. As the Erie Canal commissioners well understood, promoting the public interest and corporate gain may not actually be compatible goals.

Although government agencies need contractors to achieve their missions and many businesses depend heavily on government contracts, the two parties have different motives for cooperating with each other. The government wants acceptable work to be completed on time and within budget. Contractors, on the other hand, want to make a reasonable profit, which conflicts with the government's goal of minimizing costs. The result of these opposing interests is the complex, intricate dance that we call Bids and Proposals, which dates back at least to the Canal Era of the early 19th century.

America's Canal Era

Canal construction began soon after the new nation was founded. In the 1790s, the Middlesex Canal in Massachusetts, which linked the Merrimack River with the Charles River and Boston, and the Santee and Cooper Canal, which linked South Carolina's interior with Charleston, launched America's dynamic Canal Era. Many others soon followed, including the Chesapeake & Ohio Canal.

By the Civil War, America was dotted with canals, especially in New York, Pennsylvania, New Jersey, Virginia, Maryland, Ohio, Indiana and Illinois. Some canals were quite short, such as the Sault Canal, which was less than a mile in length and opened navigation between Lakes Michigan and Superior by bypassing the rapids and falls of the St. Mary's River. Others, such as the Wabash & Erie Canal that connected Evansville to Terre Haute and Fort Wayne, meandered for hundreds of miles through Indiana. Between 1816 and 1840, Americans invested about $125 million in canal construction, a huge amount of money for a nation where most Americans still worked on modest family farms or lived in small towns.

Most canals carried agricultural staples and coal inexpensively to eastern markets. It cost between 15 and 25 cents to carry a ton of goods by wagon over a mile of America's muddy and rutted roads. In contrast, canals carried a ton of flour, lard, and pork for less than 2 cents a mile.

Wherever canals were built, cities grew and agriculture boomed. For example, Evansville became a major river port after the completion of the Wabash & Erie Canal. Between 1853 and 1859, it received almost 4 million pounds of tobacco, 4.5 million pounds of bacon, pork, and lard, and 250,00 bushels of wheat, and sent nearly 3 million pounds of molasses and more than 1 million pounds of sugar northward on the canal.

The Erie Canal in New York State was the greatest success of America's Canal Era and a model for all subsequent canal efforts. Built from 1817 to 1825, this 363-mile canal linked Buffalo on Lake Erie with Albany on the Hudson River. By creating a cheap and reliable water route between the Old Northwest, western New York, and the Atlantic Ocean, the Erie Canal helped make New York the Empire State. In 1850, New York State led the nation in population, the number and value of its farms, and in the production of wheat, maple sugar, milk, hay, potatoes, butter, and cheese. In the same year, the Erie Canal carried about 23 million bushels of wheat and flour, almost one-fourth of all the grain produced in the United States.

Credit: Dickinson, John N. *To Build a Canal: Sault Ste. Marie, 1853-1854 and After.* Columbus, OH: Ohio State University Press, 1981, p. 133.

The Sault Ste. Marie Canal at Lake Michigan, 1855

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BOOKS

This edition's featured book reviews include *Successful Proposal Strategies for Small Businesses* by Robert S. Frey; and *Government Proposals, Cutting through the Chaos* by Rebecca L. Shannon.

The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of the APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Book Review Editors Amy Bennington and Jennifer Parks.

Successful Proposal Strategies for Small Businesses:

Winning Government, Private Sector, and International Contracts Second Edition

By Robert S. Frey, Vice President, Knowledge Management & Proposal Development
©1999 ARTECH HOUSE, INC.
472pp. $77.00 (Price includes a CD ROM)
ISBN I-58053-001-X

Reviewed by SUSAN BIELAK Proposal Development Coordinator SimplexGrinnell, a division of Tyco International

Robert S. Frey quotes "Marketing means Championing the Customer" in this second edition outlining the challenges small businesses face in today's bid market. Although small businesses (500 employees or less) account for 99% (20 million) of U.S. enterprises today, their lack of dedicated resources can leave them at a competitive disadvantage.

Key chapters include:

- Marketing to and with your clients — Discusses the importance of listening to your clients to discover what their needs are and how you can fill those needs
- Major proposal components —Gives an outline of each of the parts that make up a good proposal and describes what is needed for each.
- Tried and true proposal writing and editing techniques — Summarizes the ways to identify and discuss tangible benefits to your clients and the importance of theme-based action caption statements.

In this second edition, Robert Frey equips small businesses with the crucial information necessary for competing against large corporations by:

- Directing his audience toward self-help Web-based programs, manuals, agencies and programs geared toward small business success.
- Stressing the importance of a dedicated, full-time Business Development Group and Proposal Team.
- Outlining the support available in partnering, subcontracting, and mentor-protege programs.
- Addressing the benefits of company membership and participation in trade and business associations.
- Pointing out how to influence the RFP by getting your foot in the door ahead of time. Knowing your customer's needs before the RFP process begins, allows you to position your solution to address their problem. The customer will ultimately develop an RFP that requests what you have to offer.
- Discussing the use of proposal development tools, such as developing a theme (a sales message depicting a unique benefit to the customer).
- Detailing how costs can be controlled with go/no go decisions, eliminating wasted efforts.
- Showing how collecting and analyzing data can avoid repeating past mistakes by recording "lessons learned."

From beginning to end, this book is a most comprehensive collection of information for the small business sector competing against corporate giants.

Each chapter concludes with "End Notes" that lead the reader to more detailed information available from other sources. The CD included in the back pocket is very useful. It contains the following key information:

Useful Proposal Templates, such as the Pre-Proposal Interview Form and the Proposal Summary Sheet. These are great tools for gathering information necessary to customize proposal text to meet customer needs, and to develop solutions to meet their requirements.

> *The proposal templates are extremely useful tools. These templates would take hours to produce from scratch. The small business Web site listing also contains key links to additional information.*

Small Business Web Sites such as http://pro-net.sba.gov — an electronic gateway of procurement information, and http:// www.sba.gov, a Web-site providing information on:

- Starting your own business
- Obtaining financing
- Business opportunities
- Offices and services for assistance
- Local small business offices.
- Proposal and Contract Acronyms, 25 pages of acronyms related to proposal and contract work.
- Proposal Cybrary Electronic Infrastructure—This tool provides a top level "statement of work" summary of the major elements that may be included in an electronic proposal library.

The proposal templates are extremely useful tools. These templates would take hours to produce from scratch. The small business Web site listing also contains key links to additional information.

This edition covers extensive information, ranging from hands-on discussions regarding the use of action captions to discussions on the turbulent transition toward knowledge-based business. Although the title suggests that the information is prepared for small businesses, organizations of all sizes can benefit from the wide range of information contained in Mr. Frey's book and CD.

more...

"This book will be useful to mid-size companies and proposal centers that respond to government proposals. The author makes good use of examples and provides templates that proposal professionals can easily duplicate."

Government Proposals

Cutting through the Chaos

By Rebecca L. Shannon
©2001 Management Concepts, Inc.
230 pp. $99.00
ISBN 1-56726-126-4

Reviewed by AMY BENNINGTON

"I want to be able to produce winning proposals in a stress-free environment so I can continue using the skills I've honed without dying before my time." This quote from the preface encapsulates the entire philosophy of *Government Proposals, Cutting Through the Chaos.* Throughout this book, Rebecca Shannon provides detailed explanations, processes, and procedures to produce winning proposals while reducing or eliminating the stress often accompanying proposal development and production.

The book is arranged in 12 chapters and two appendices covering:

1. Setting the Context
2. Understanding the Roles and Environment
3. Setting the Stage for Success
4. Establishing a Proposal Process
5. Tracking the RFP
6. Preparing for Production
7. Gearing Up
8. Building the Proposal Text
9. Holding Proposal Reviews
10. Producing the Proposal
11. Planning an Oral Presentation
12. Controlling Day-to-Day Work
    Appendix A. Checklists
    Appendix B. Samples
    Index

Rebecca Shannon has 16 years experience in the proposal field in such positions as editor, production manager, consulting writer, and proposal manager. In *Government Proposals, Cutting through the Chaos,* she uses her philosophies and proposal management tools to provide the reader with a comprehensive instruction manual on how to produce winning proposals in a stress free environment. Although the target audience for this book is those who can implement or correct processes, all who work in the proposal field could benefit from the strategies provided by this author.

The book begins by offering the reader some basic background information on the government procurement process. This chapter lists each step in this process, from researching the organization through holding debriefings. Each step is discussed briefly to ensure the reader understands the process and how the proposal team fits into that process.

Throughout the book, the author reminds the audience of the importance of management support if the proposal process is to be successful. The author provides a list of points to discuss with your manager to gain his or her support and understanding of the process. Some of these points include:

The company wants to produce winning proposals in a stress-free environment. The manager must not only agree on this point, but also believe it is possible.

The process must remain stable while allowing room for individual adjustments, such as government requirements. The author suggests looking at proposal development as a manufacturing process and developing procedures to be used for each proposal. The author provides a step by step plan on how to establish a proposal process in Chapter 4.

The proposal shop must receive reliable assistance from the other divisions on which it depends.

The proposal team must be willing and able to meet the proposal schedule without substantial overtime.

The last two points directly relate to the concept of a stress free environment. If the proposal team has to work significant overtime, or if other divisions are not reliable, both the stress level and the quality of information provided are compromised.

The remainder of the book focuses on the actual process from the kick off meeting through oral presentations. The book wraps up with a discussion on how to manage the day-to-day work of the proposal team.

This book will be useful to mid-size companies and proposal centers that respond to government proposals. The author makes good use of examples and provides templates that proposal professionals can easily duplicate. Those in a position to implement change can easily put into action the suggestions provided by Rebecca Shannon.

Rebecca Shannon has 16 years experience in the proposal field in such positions as editor, production manager, consulting writer, and proposal manager. In Government Proposals, Cutting through the Chaos, *she uses her philosophies and proposal management tools to provide the reader with a comprehensive instruction manual on how to produce winning proposals in a stress free environment.*

PRODUCTS & COMMERCE

RFPMaster Product Demonstration Review

This review of *RFPMaster,* a proposal response tool designed by Sant Corporation, was based on the reviewer's analysis of the product and its features, including navigation, tools, and documentation.

Product:
RFPMaster 5.0

Manufacturer:
Sant Corporation

Review By GREG WILSON, CACI

Description/Features/ How It Works

R*FPMaster* is a robust tool with a variety of functions that, when used properly, can be useful to any proposal professional. The developer claims that the software allows users to answer complex Request for Proposals (RFPs) in a fraction of the time. After my review, I found that *RFPMaster* serves as a great organizational tool and a powerful RFP response mechanism when used to its fullest potential.

It would be extremely difficult to adequately describe every function of *RFPMaster* in this brief space. Even after reviewing the product over the period of a month, I did not use all of the available tool sets. For the purpose of this review, I will concentrate on the following: RFP parsing or "bursting;" creating, managing, and searching for answers to RFP requirements; creating a compliance matrix; and creating the final RFP response.

RFP Parsing

One of the first things that drew me to review a product like *RFPMaster* is the ability to electronically parse an RFP. Most APMP members probably know how time consuming it can be to manually identify actual RFP requirements, organize them, and separate them from the rest of the RFP text. Parsing the RFP manually enables a thorough review, but it seemed to me that finding a way to easily separate actual requirements from other material would be a great time saver, allowing the reviewer to concentrate on the actual requirements and distribute them conveniently. This decreases workload and encourages other participants to actually read the requirements — something that is not always guaranteed when a complex 200-page RFP is distributed.

The bursting function of *RFPMaster* is an excellent tool that allows users to accomplish most of the above, and much more. Users acquire the RFP document in MSWord, remove the material that will not appear in the RFP response, and are then prompted to highlight the remaining text and identify it as a header, a question, or a feature matrix. Headers are section headings and introductory phrases that do not indicate a question or response requirement, but still need to be included in the RFP response. Questions are requirements that need some sort of response. Finally, feature matrices are tables that need to be filled in by a list of features or other information. A good example of a feature matrix is a past performance form.

Once identified, *RFPMaster* automatically creates a database using each header, question, or feature matrix as a separate entry. The screen interface allows for easy organization and manipulation of all entries. This new database serves as the basis for the RFP response. A manager can relay win themes/strategies/messages using the comments feature. When questions are assigned to team members, a comment can be added. A yellow note icon will indicate to the team member that a comment is attached. This is useful for relaying strategies, customer hot buttons, and win themes that specifically apply to the subject RFP question/requirement.

RFPMaster also offers a method of automatically designating questions, headers, and matrices within an RFP by using the Smartmarking tool. If the RFP has a standard formatting scheme, users are able to enter and assign criteria (such as paragraph length, numbering, font formatting) to each of the three types of RFP information. Then the program does the work, and the RFP information is automatically burst into a database.

more...

The product reviews in Proposal Management are provided as an informational service. The views expressed here are those of the reviewer and do not necessarily reflect the views of the APMP.

Responding To Questions/ RFP Requirements

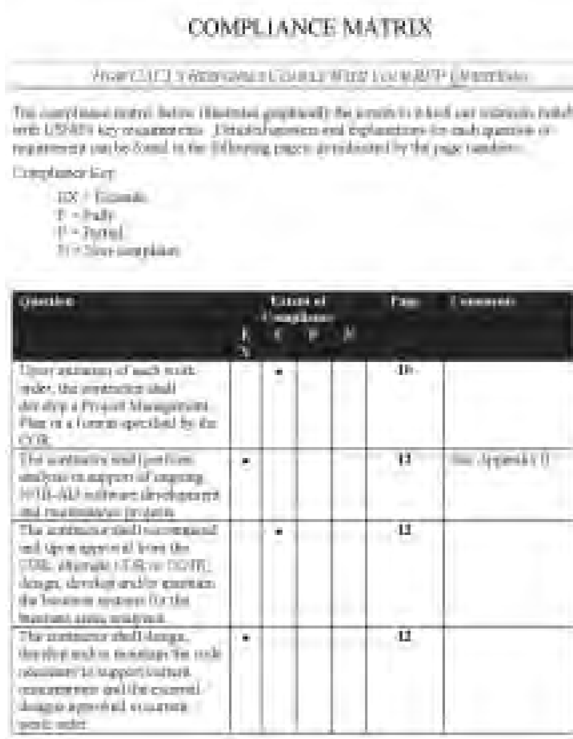
When the actual questions/requirements are identified, they must be answered. An obvious method for accomplishing this is to go ahead and type in an answer. There are a number of different ways to view the question and input the answer. The question and answer pair can be opened as unformatted text within *RFPMaster,* or they can be opened as formatted word documents within *RFPMaster.* In the Word document mode, graphics, charts, and tables can be inserted.

Another method for answering questions is by first searching the corporate database. The corporate database consists of all questions and answers that have been used in previous company proposals, and is a function of *RFPMaster.* A designated *RFPMaster* system administrator maintains the database, and questions and answers are assigned various key words and categories to allow for more powerful searches. Take, for example, a question about a company's approach to cost control. The answer may be assigned to a "Management Tools" category, and given key words such as "cost control, cost avoidance, and status reporting."

The user can search the database in two ways—the Auto-search or the Custom Search. If Auto-search is chosen, *RFPMaster* identifies similarities between the subject question and questions and answers already in the database. All Q&As that share some characteristics are listed by order of similarity. The user can then view the answers and take actions such as cutting them from consideration, retaining them, or assigning an answer to the subject question. The assigned answer can then be modified to better fit the question in the current RFP response. Users can also initiate more accurate Custom Searches, where categories and key words are identified for a more focused search.

One of the most important effort and timesaving features of *RFPMaster* is obtaining answers from the Corporate Database and thus eliminating the need to develop answers from scratch. Common sense dictates that most answers will have to be modified at least slightly to respond to the current RFP, but the bulk of the response will be complete in seconds. Of course, companies can only take advantage of this feature if they have a large and diverse corporate database that is maintained regularly.

The "Project View" screen displays each RFP response element, the status of the response, the team member to whom it is assigned, and its due date. The view can be modified to include more data, according to the user's specifications. Proposal personnel can quickly and easily manage proposal content from this screen.



RFPMaster's compliance matrix creation utility is a convenient way to produce a powerful evaluator aide.

Compliance Matrix

RFPMaster includes a compliance matrix creation tool that enables users to generate a matrix based on the identified RFP requirements. For each question, the user can assign a level of compliance (whether the proposal exceeds, meets, partially meets, or does not comply to a specific RFP requirement), edit/shorten the RFP requirement to fit in a table, include a comment on a particular requirement, and display the page number where the requirement is addressed within the *RFPMaster*-generated final document. The matrix is a valuable guide for reviewers of the proposal, who can readily find where each RFP requirement is addressed. It is also a good method for an internal "status report" on the progress of the proposal.

Creating The RFP Response

When all RFP requirements have been responded to and received final approval, the final document can be built within *RFPMaster.* The user selects styles and formats that should be applied to RFP questions/requirements, answers, headers, etc. Other tools, such as including the compliance matrix, generating a title page with customer information, and adding appendices are also activated at this step in the process. When all selections are made, *RFPMaster* builds the final document in MSWord. The final document is created and ready for printing, or any other editing/formatting that the user wishes to apply.

Other Tools

There are numerous tools available within *RFPMaster* and characteristics of the software itself that have not been covered in this review. One of the most important is the management function. Proposal Managers can do the following: assign a question to a team member(s), track the progress of each answer, use the calendar function to assign due dates, and share comments on individual questions or the project as a whole. To facilitate this function, *RFPMaster* can be installed on a network, and each user is assigned an ID, a password, and a role that limits their access to only the necessary information. *RFPMaster* also has an e-mail function to facilitate communication among team members.

System Requirements

Processor	Pentium 166Mhz or greater
RAM	32MB (64MB recommended)
Hard Drive Space	30 MB Free (Client Edition Users) 100 MB Free (Professional Edition Users)
Screen Resolution	Optimized for 800x600
Operating System	Windows 95, 98, 2000, ME, or NT 4.0 SP5 or higher
Application Software	Microsoft Word 97SR2 or higher
Browser	Microsoft Internet Explorer 5.0 or higher
Data Access Component	MDAC 2.6 or higher (this is automatically installed with RFPMaster)

Strengths

The most important strength of *RFPMaster* is its versatility. This product was created by proposal professionals and has the inherent flexibility to be applicable in most RFP response situations. Proposal professionals can use the entire function of *RFPMaster,* from RFP bursting to document creation. Or, if they choose, they can simply use the product to search the corporate database, gather pertinent information electronically, and go through the rest of the process on their own. The software can be installed over a corporate network with links to Microsoft Office, making it accessible to proposal contributors. Customers can purchase the *eRFPMaster* server software and run *RFPMaster* through their Web browser over their corporate Intranet. This is a true Web-based solution for customers with offices around the world. The point-and-click interface makes for easy navigation, and the on-line documentation is clear and straightforward. All of us know how daunting a task managing a large proposal effort can be — any tool that saves time and allows for easy organization and access to response information would be a valuable addition to any proposal process. *RFPMaster* accomplishes this task and includes other features and tools that save time and effort when preparing a response.

Weaknesses

One of the items that I was most interested in was *RFPMaster's* ability to burst an RFP document into different requirements. This tool works well for its intended purpose, but I would have liked more flexibility in deciding what would and would not appear in the actual RFP response. When bursting RFP requirements, it is important to include background information so that the person assigned to respond to the question knows the pertinent information. In *RFPMaster;* however, any information included with the question will appear in the final response document. I think adding a "heading" attribute to each question/response pair would be beneficial in specifying exactly what will appear before each response. This problem can be overcome by including any background information using the "comments" feature (or by simply editing the finished MSWord document), but if it were addressed in the actual RFP bursting process, it would be less cumbersome. Navigation is convenient, but not always intuitive. There were times when I did not know what to select in order to proceed to the next screen. This faded over time, but some improvements can be made in this area. Finally, as with any software of this type, organizations will only find it useful if they are diligent in populating the corporate database with quality answers to requirements.

Customer Experiences

TransEquity, Inc., a company specializing in relocation needs and management services, was under pressure to respond to numerous RFPs with limited proposal resources. They acquired *RFPMaster* and loaded two years' worth of proposals into their RFPMaster Corporate Database in only three days. Subsequently, the time needed to assemble a first draft RFP response was reduced from one week to one day. This enabled their marketing personnel to spend more time concentrating on specific customer requirements and hot buttons, greatly improving the effectiveness of their RFP response process.

Cost

RFPMaster Professional - $1,250 per user (Professional License is necessary for designated company RFPMaster system administrators. At least one is necessary for each implementation.)

RFPMaster Client - $595 per user (for the average user)

The *eRFPMaster* server costs $9,000, plus the applicable Professional and Client licenses.

Contact

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Greg Wilson is a proposal professional at CACI, Inc. and wrote a review of various Proposal Automation Products in the previous issue. He can be contacted at GWilson@caci.com. If you would like to recommend topics or products for review in a future edition, please contact him or the Managing Editor.

EDITORIAL STATEMENT AND GUIDELINES FOR AUTHORS

Proposal Management, the Professional Journal of the Association of Proposal Management Professionals (APMP), publishes articles and original innovative studies about proposal development and proposal management.

Editorial Statement

Proposal Management invites authors to submit their best research for peer review. Manuscripts may be of practical or scholarly importance to APMP's audience of proposal development, acquisition, procurement, business development, sales, and program management professionals.

Content

Proposal Management publishes the following types of peer-reviewed articles:

- Results of original research on proposal-related topics.
- Original contributions to proposal-related theory.
- Case studies of solutions to proposal-related problems.
- Tutorials on proposal-related processes or procedures that respond to new laws, standards, requirements, techniques, or technologies.
- Reviews of proposal-related research, products, books, bibliographies, and bibliographic essays.
- Views and commentary.

The journal promotes APMP and its goals through the timely publication of articles, reviews, and references. The journal is a medium for promoting constructive, intelligent discussion and debate about proposal development and management. Because the primary audience of the APMP professional journal is informed practitioners in the private, government, and nonprofit sectors, manuscripts reporting the results of research or proposing theories about topics should include descriptions of or suggestions for practical applications.

Submissions

The following are requirements for articles/manuscripts submitted:

- Not more than 30 pages (15 pages single-spaced) including exhibits, printed on 8 1/2" by 11" paper.
- 12-point font and at least one-inch margins on all four sides.
- Double-spaced throughout, including references.
- Submit via e-mail or an electronic file of your article on a 3 1/2 - inch disk (high density format). Microsoft Word is the preferred electronic format; Corel, WordPerfect, Rich Text Format (RTF) or ASCII file format is also acceptable. Alternatively, you may submit four hard copies of your article via regular mail.
- In addition to the text file, submit one electronic file for each figure in TIF or JPG format. Screenshots are preferred to be captured and output should be 6 inches (width) by 4.5 inches (height) for full screens. Because illustrations will be reproduced in black and white, they are best captured in grayscale rather than color.
- Submit your article to *Proposal Management's* Managing Editor or the Chair of the Editorial Advisory Board. (General inquiries can be made to the APMP Executive Director at 909-659-0789.)

Note: We also solicit guest commentators for contributions to Trends and Views.

Manuscript Preparation

The following guidelines should be followed in preparing manuscripts for submission:

- Provide the manuscript's title and name(s) of author(s) at the beginning of the paper.
- Provide an informative abstract labeled "Summary" of approximately 150 words.
- Use up to four levels of heading.
- Place all exhibits in the text with a descriptive caption.
- Bibliographic references should be indicated in the text by the last name and year of publication in parenthesis (i.e., (Jones, 1978)). At the end of the text, provide a complete list of works cited (labeled "References") using full names of the authors and their book.
- All citations in References should conform to standard academic practices. Conformance with *The Chicago Manual of Style,* 14th Edition, pp. 640-699, is preferred.
- At the end of the text file, include a biographical sketch labeled "Author(s)" of no more than 100 words for each author. Describe author's professional experience, education, institutional affiliation, professional organizations, and other relevant information. Include an e-mail address and a telephone number where you can be reached during business hours.

Style

Proposal Management articles must be well-organized and readable. Write clearly and avoid jargon and acronyms. Use the active voice. Avoid language that might be construed as sexist, and write with the journal's nationwide audience in mind.

Spelling and usage should conform to *The American Heritage Dictionary,* 4th edition. Punctuation, format, and citation style should conform to *The Chicago Manual of Style,* 14th edition.

Review

Submissions, if they conform to the above specifications, will be reviewed by the journal's Editorial Advisory Board in accordance with the Board's internal procedures for review. In general, articles will be evaluated in terms of the relevance of the topic; its potential contribution to our understanding of proposal development or management; and its readability. When appropriate, the Board may provide the author with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Conflict of Interest

While journal staff and contributors to *Proposal Management* may benefit from the professional recognition they gain through this affiliation, they shall not use the journal as a forum to give inappropriate or unfair advantage to themselves or others. Journal staff members and contributors are permitted to purchase advertising in *Proposal Management* at standard, published rates.

Any staff members or contributors who believe themselves to have a potential conflict of interest must immediately notify the Managing Editor of the journal, who will decide whether a potential or real conflict of interest exists. Based on the Managing Editor's decision, journal staff or contributors may be asked not to involve themselves on the subject of the conflict of interest.

Objectivity

The information and viewpoints expressed by authors or staff members in the journal should be based on objective, balanced research and analysis to the extent afforded by available resources. The views expressed by contributors and staff do not necessarily represent the views of APMP.

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