Welcome

Ali Paskun, AF.APMP

I recently posted a question on the APMP LinkedIn discussion forum asking members to share what motivated them to join our organization. A common answer was that joining APMP is a way to learn best practices, tips, and tricks from other professionals in our industry. Taking advantage of the knowledge base at the Annual Conference and local chapter-sponsored meetings is an excellent opportunity to refresh old skills and add new ones into our toolkit. The *Journal* is another available resource. As in the past, this issue contains many ideas to help improve processes and techniques; promote new best practices; and, in the long run, help make this crazy business we are in less stressful.

This issue includes reports on two research projects sponsored by the National Capitol Area chapter. First, Mike Parkinson presents the findings of a study he conducted to determine the success of a standardized and repeatable process to turn "text and ideas into compelling graphics by choosing the appropriate visuals to communicate concepts." Second, Jim Hiles and Earl Wells report on a project to explore the sometimes difficult puzzle of source selection evalautions that they cleverly compare to sudoku, a number placement puzzle.

Obviously every proposal starts with a bid decision. How many of us have second guessed a bid decision during the proposal process? We have supported proposals where the bid decision was made late, leaving less time to prepare a winning bid. The lack of adherenance to any best practice leaves us certain that the bid will lose, yet imagine our surprise when we are given the award! In the piece "Just Say No? Nah! Best Practices for No-Bids," Randy Randazzo; Mitch Boretz, F.APMP; Nora O'Toole; and Ginger Levin, D.P.A, PMP, PgMP help define a structure around an effective bid/no bid decision process.

So often, we use jargon that sounds like we are heading into battle. We discuss our win strategy in war rooms to determine the best way to capture a deal. In the article "Know Thyself, Know Thy Enemy"—Applying the Principles of War to Capture Management," Todd B. Rudy examines how the principles of warfare described in the most recent The U.S. Army Field Manual FM 3-0 benefit capture managers.

What new or improved technique do you use or want to develop? Conduct your research through the APMP grant program. Write an article for the *Journal*. Give a presentation at a chapter event or the Annual Conference. You will help broaden our Body of Knowledge, and your APMP colleagues will appreciate the opportunity to learn something new!

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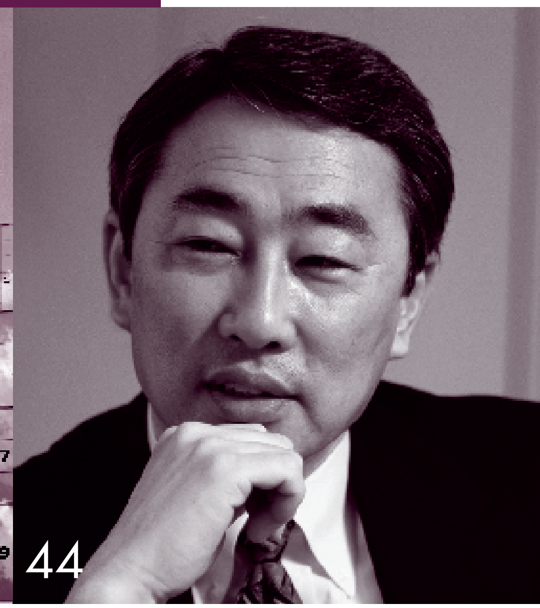

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Kirste Webb, AF.APMP

Change is Good

Change is good, but it can also be very scary. We tend to get used to doing things a certain way, so it is hard to accept that there could be another way. This is how I felt not too long ago. I have worked for a contractor for nearly 25 years, and the past 9 years for the same company. I had not been anywhere that long before. I knew in my heart, though, that the time would come for me to change. I have contemplated for years the possibility of being a proposal consultant. So when the opportunity came along to enter the world of consulting, I took the chance. Was I scared? Absolutely!!! I spent several weeks contemplating the "what-if" scenarios. What if I could not get an assignment? What if I did not do well? Then, I found this quote by Pauline R. Kezer: "Continuity gives us roots; change gives us branches, letting us stretch and grow and reach new heights."

"We all have big changes in our lives that are more or less a second chance."

– Harrison Ford

"Continuity gives us roots; change gives us branches, letting us stretch and grow and reach new heights."

– Pauline R. Kezer

I realized that the change I was about to embark on was good.

APMP is also changing. Over 20 years we have seen our organization go from a small group of individuals, primarily focused on defense systems opportunities, to a diverse, worldwide group that is oriented to commercial, government, and international business opportunities. We have more than 3,700 members in 68 countries. Members are able to participate in face-to-face meetings, video conferences, and APMP-hosted Webinars for educational initiatives. Instant messaging and social networking are simply other tools available to get real-time ideas and lessons learned.

APMP is undertaking more changes to the way in which members interact with APMP and APMP members online. Changes are going to include online enhancements for chapters and groups to interact with their affiliated members, and for members to network and communicate with other members. Members will have more options for participating in groups and events, tracking Accreditation and CEU progress, seeking career opportunities, and sharing ideas.

We have been listening to you and hope that you will welcome these changes. They will not be easy, and they will not happen overnight. But our goal is to make APMP a more user-friendly and useful tool for the proposal professional's toolbox.

Dwight D. Eisenhower said: "Neither a wise man nor a brave man lies down on the tracks of history to wait for the train of the future to run over him." I have no idea what the future holds, but now that I am on my first gig, I can say truly that I am very glad that I have made this change.

"Change is inevitable - except from a vending machine."

— Robert C. Gallagher

"Neither a wise man nor a brave man lies down on the tracks of history to wait for the train of the future to run over him."

– Dwight D. Eisenhower

Mission

- Our mission is to "Advance the arts, sciences, and technologies of new business acquisition and to promote the professionalism of those engaged in those pursuits."
- The core of our mission and our organization is proposal related. The broader mission of APMP includes the entire new business acquisition cycle, while maintaining proposals as the cycle core. New business acquisition encompasses marketing, business development, and acquisition activities from early marketing positioning through negotiations and award. APMP recognizes that, as proposal professionals, all members are dedicated primarily to the successful execution of one or more of the diverse activities involved with proposal execution.
- We further recognize that including new business acquisition as a part of our mission provides an opportunity to expand knowledge and capability for our members, providing them with information regarding the entire business acquisition cycle.

Code of Ethics

Members of the APMP are expected to:

1. Comply with rules, government regulations, and laws in their respective countries, as well as other appropriate private and public regulatory agencies.
2. Ensure compliance with all rules concerning interaction with clients and government liaisons.
3. Protect sensitive information, and comply with all legal requirements for the disclosure of information.
4. Avoid conflicts of interest, or the appearance of same, and disclose to their employer or client any circumstances that may influence their judgment and objectivity.
5. Ensure that a mutual understanding of the objectives, scope, work plan, and fee arrangements has been established before accepting any assignment.
6. Represent the proposal profession with integrity in their relationships with employers, clients, colleagues, and the general public.
7. When in doubt about how to resolve an ethical dilemma, confer with a person you trust—one who is not directly involved in the outcome.

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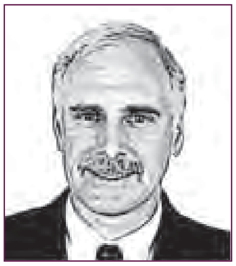

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Our mission is to advance the arts, sciences, and technology of new business acquisition and to promote the professionalism of those engaged in those pursuits.


The Art of
Winning
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International Conference
& Exhibits
Sheraton Denver
Downtown, Colorado,
31 May – 3 June 2011
APMP®

APMP's mission is to advance the arts, sciences, and technology of business development acquisition and to promote the professionalism of those engaged in those pursuits through the sharing of non-proprietary proposal methods, approaches, and processes. APMP conducts meetings and events both on a national/international scale and at the local level through individual chapters.

Membership

The people of APMP are some of the most resourceful professionals in the business world today. We invite you to join us and discover how we can help you pursue new horizons in proposal excellence. To access a New Member Registration Form, renew your membership, or find information on becoming a Corporate member of APMP, please visit the Website (www.apmp.org), and click on "Membership."

Membership in APMP is $125.00 (USD) per year, renewable on the anniversary date of joining the Association. Retiree and (full-time) student membership dues are $75.00 (USD) per year. If you do not wish to provide credit card or electronic check information online, please complete the membership application and indicate you are paying by check. Then contact MemberServices@apmp.org or call Suzanne Kelman at (714) 392-8246 to make arrangements for payment.

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Suzanne Kelman, AF.APMP
PO Box 668
Dana Point, CA 92629-0668
phone: (714) 392-8246
email: memberservices@apmp.org

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Rates per Issue
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(Sold for both 2011 issues)

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- Electronic copy—due March 1st (for Spring) or September 1st (for Fall)
- Final payment due to APMP—March 1st (for Spring) or September 1st (for Fall).

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Invitation to Writers

Contribute to our next issue. Let us hear from you today. We are open to many and varied topics of interest to professionals in our field.

Send us a letter, submit an article, or propose your topic of interest. Submit a short (50-word) proposal for your article summarizing its principal thesis, issues, basis, and scope. You do not need to be an APMP member to contribute.

If you would like to submit an article, begin by reading the "Editorial Statement and Guidelines for Authors." There you will find our general guidance on manuscript preparation, scope of content, style, and methodology for submission and review.

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The Journal of the Association of Proposal Management Professionals (The Journal) publishes articles, research efforts, and case studies about business development and proposal management. It provides examples of practical application of industry-accepted best practices to enhance our readers' professional development. You are invited to submit articles for publication in The Journal. We are open to many and varied topics of interest to professionals in our field.

Guidelines for Authors

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If you would like to submit an article, begin by reading these "Guidelines for Authors." They provide general guidance on manuscript preparation, scope of content, style, and methodology for submission and review. The following table provides *The Journal's* publication schedule to aid authors in determining submission milestones.

	Spring/ Summer	Fall/ Winter
Concept approval	August	February
Summary and outline due	October	April
Article first draft due	December	June
Peer review	January	July
Article final due	February	August
Print	March	September
Distribute	April	October

Editorial Statement

The Journal 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

The Journal 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. It is a medium for promoting constructive, intelligent discussion and debate about business development acquisition and proposal management. Because the primary audience 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, 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 an electronic file of your article via email; Microsoft® Word is the preferred electronic format
- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format; screenshots are preferred to be captured and output should be 6" (width) by 4.5" (height) for full screens
- Submit your article to the Managing Editor or the Chair of the Editorial Advisory Board:

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 fourth-level headings
- 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 parentheses [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* 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 an email address and a telephone number where you can be reached during business hours.

Style

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* international audience in mind. The authority for spelling/usage is *Webster's Dictionary*, and *The Chicago Manual of Style* is the authority for punctuation and format. All articles are reviewed and edited by members of *The Journal* staff.

Review

Submissions, if they conform to the above specifications, will be reviewed by the Editorial Advisory Board (Managing Editor, Assistant Managing Editor, and two anonymous outside reviewers). In general, an article will be evaluated in terms of the relevance of the topic, its potential contribution to our understanding of business development or proposal management, and its readability. When appropriate, the Board may provide the author(s) with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Acceptance

When appropriate, authors whose articles or book reviews have been accepted for publication will be responsible for incorporating comments from the Editorial Advisory Board into the final version of their articles. Once an article or book review has been accepted for publication, it will be subject to routine copyediting by the staff of The Journal. Copyediting is an internal process and consequently copyedits will not be reviewed by authors.

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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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The Science of Proposal Graphics

By Mike Parkinson, AF.APMP

Although few of us are artists and graphics designers, proposal professionals can develop good proposal graphics. Find out how you can improve the visuals in your proposals.

Repeatability is a critical success factor in your profession and your organization. Turning what you do into a repeatable process that anyone can learn and use can be challenging. Most proposal professionals fail to turn their art into a science. A standardized process for making clear, compelling, winning proposal graphics is notoriously elusive. If our industry can turn something as creative as graphic development into a system, then anything can be systematized.

Recently, the APMP National Capital Area (NCA) chapter sponsored a grant to study the efficacy of my proposal graphics process. The goal was to learn if I could teach others to turn their words, ideas, and solutions into powerful proposal graphics. (Over time, I will track the success of the process to learn how it affects win rate.)

Prior to the study, I had good evidence that the process was easily learned, easy to implement, and resulted in successful graphics, but I lacked hard numbers. Additionally, it was my baby, so I was far from objective. I needed to measure performance objectively. My three-step approach is shown below.

Each volunteer brought sample graphics that they wanted to improve using my methods to the study. I first trained the volunteers as a group and then worked with them individually, encouraging them to continue practicing until they felt comfortable. I presented the examples—before and after graphics—to approximately 200 attendees at the APMP NCA Annual Professional Day event. The intent was to let the audience formulate their own opinions from the information I shared.

The Volunteers

I was fortunate to receive several requests to volunteer for the experiment. I chose four proposal professionals from different organizational backgrounds with different graphic challenges. They were as follows:

Keith Wallace was the only volunteer with a design background; he was a draftsman. The other volunteers had no design experience. All had some experience with proposal graphics but were unhappy with the results.

Andre Biscoe – GRS
Director of Proposal Management

Biggest Challenge: Building clear, concise, convincing graphics

Bob Gillette – Communications Resources, Inc. (CRI)
Director of Business Development

Biggest Challenge: Developing crisp, clear theme graphics

Laura Lewis – Qvine Corporation
Program Manager

Biggest Challenge: Making sure graphics are not too complex and that they are understandable

Keith Wallace – Wyle
Proposal Development Manager

Biggest Challenge: Full grasp of what graphics could look like (i.e., current graphics programs and tools)

Figure 1. The participants in the study come from a varied backgraund with only one possessing previous design skills.

STEP 1

Select volunteers with different professional and organizational experience

STEP 2

Train

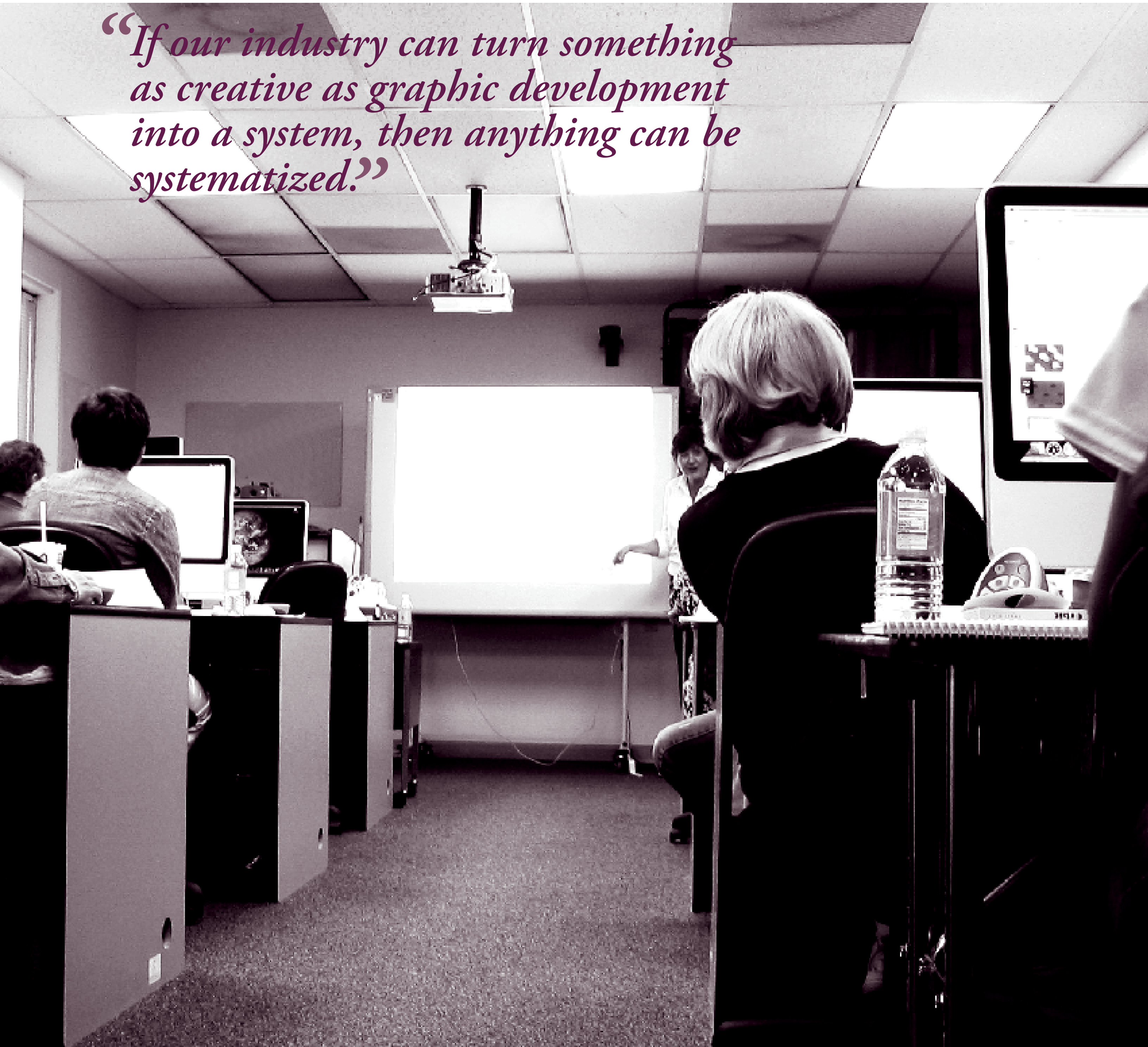
- Group (4 hours)
- Practice (up to 4 hours with tutor)

STEP 3

Measure Performance (before and after):

- Questionnaire
- Duration
- Effectiveness
- Self

“If our industry can turn something as creative as graphic development into a system, then anything can be systematized.”



The Graphics Process

The process I teach focuses on conceptualization—turning text and ideas into compelling graphics by choosing the appropriate visuals to communicate concepts. An aesthetically appealing graphic that lacks clarity and compelling information usually fails. Most organizations can hire a capable graphic designer, but only a small handful has the ability to conceptualize a successful graphic.

I started the study by teaching the volunteers my P.A.Q.S (Primary Objective, Audience, Questions that Need to be Answered, and Subject Matter) method, which forms the basis of graphic conceptualization. Once they worked out answers to each of the P.A.Q.S. points for their graphic, they moved on to choose the proper method to communicate their idea. Their next steps were sketching, validating, and then rending their graphic. The following graphic summarizes my conceptualization training:

The volunteers used this graphic (Figure 2) along with a P.A.Q.S. Questionnaire as a roadmap to develop their graphics.

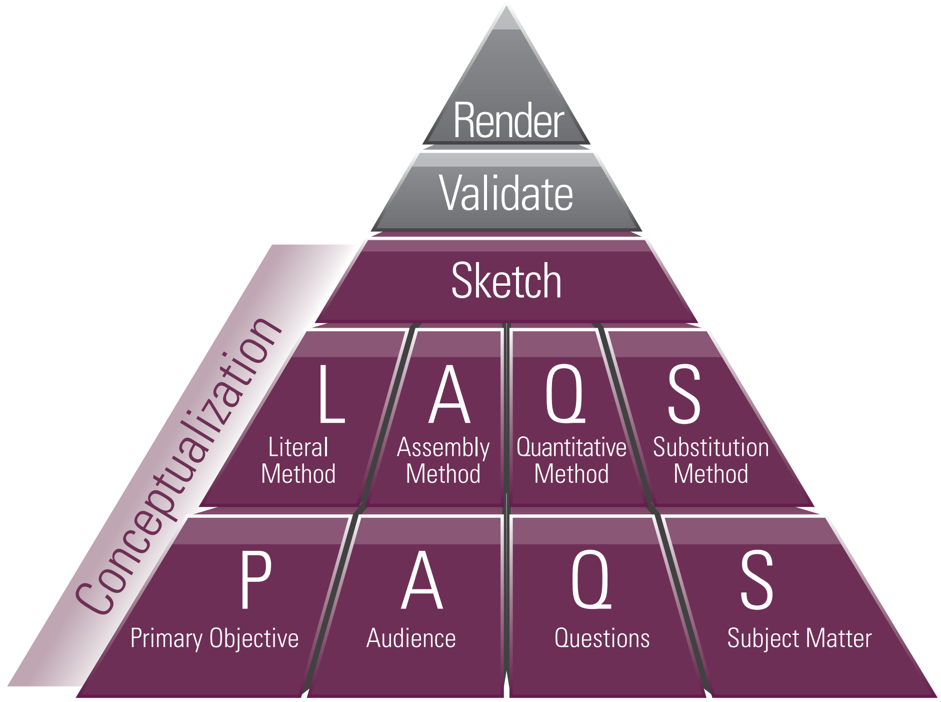


Figure 2. The P.A.Q.S Roadmap as used by participants in the study.

Performance Measurement

Performance was measured in three ways. First, we measured time to completion by comparing conceptualization time prior to learning the process with conceptualization time after the process was shared. Secondly, we measured the improvement between the "before" graphic and the "after" graphic. Did the "after" graphic better communicate their concept? Lastly, all volunteers received a questionnaire before and after the experiment to measure the delta between start and finish. The questions are shown in Figure 3 at right.

The Results

I presented three examples from our class to our audience at the APMP NCA Annual Professional Day event. All participants shared their "before" graphics, the P.A.Q.S., and the "after" graphics (sketched by the volunteer). We applied the P.A.Q.S. to uncover why the "before" graphic failed. One example from the study along with the P.A.Q.S. answers, and my rendering of the final graphic is shown in Figure 4 on pages 22 and 23.

By reviewing the final graphic, see if you can find the answers to the questions posed in their P.A.Q.S. questionnaire. The "after" graphic took less time to develop, because the P.A.Q.S. gave them direction in what the graphic needed to communicate.

Figure 5 is another example along with my rendering of the final graphic on pages 24 and 25.

Again, can you see how the final graphic answers the questions posed in their P.A.Q.S. worksheet? The primary objective is now clearer than in the original graphic.

Before and after the study, the participants filled out a questionnaire to measure their performance and comfort level with graphics and conceptualization. Figure 6 shows the results from the questionnaire.

Graphics, if done properly, can significantly increase win rates

O O O O O O O O O O

Strongly Disagree Strongly Agree

I am comfortable conceptualizing graphics (turning words and ideas into clear, compelling visuals)

O O O O O O O O O O

Strongly Disagree Strongly Agree

I regularly use a conceptualization process

O O O O O O O O O O

Strongly Disagree Strongly Agree

(If applicable) I am happy with my conceptualization process

O O O O O O O O O O

Strongly Disagree Strongly Agree

My company's graphics are clear, communicative, and compelling

O O O O O O O O O O

Strongly Disagree Strongly Agree

My three biddest graphics challenges are:

Figure 3. The participants in the study are asked to fill out this survey both before and after the training to measure their experience.

P.A.Q.S.

Primary Objective:

Quickly Staff Qualified Personnel

Audiance:

US Army

Questions:

How quickly can you staff?

Where do you recruit your staff?

Is your staff cleared?

How do you qualify staff?

Do you train your staff?

Before

Duration: 2 Hours (estimated)

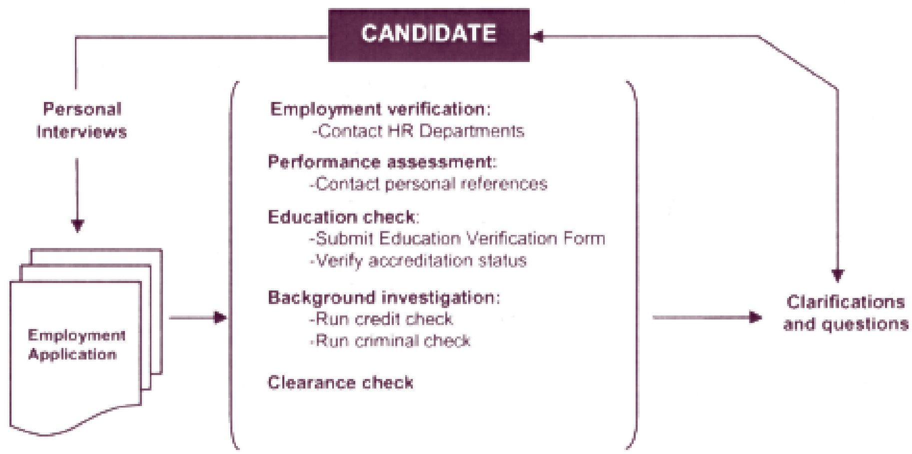


Exhibit J Personnel Qualification Methodology

Sketch

Duration: 25 Minutes (+2 Icons)

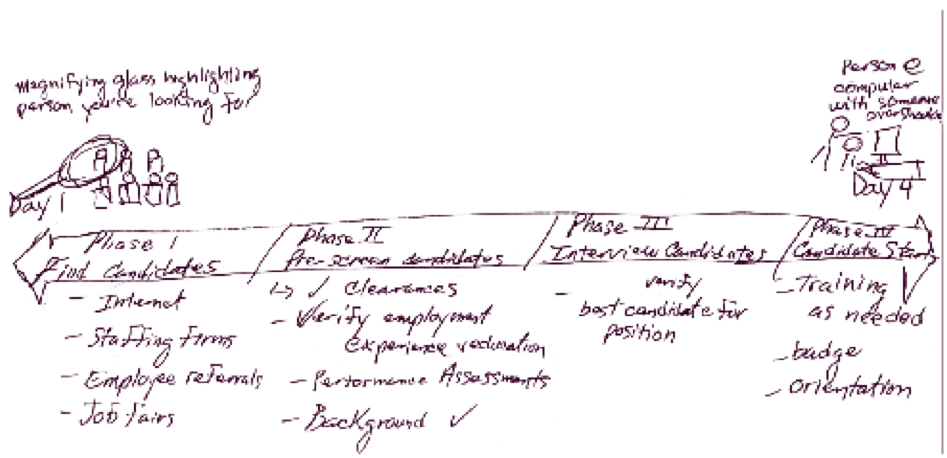


Figure 4. Sample "before" and "after" graphics.

After – Professional Render

Day 1 | Day 4

Phase 1 Find Candidates	Phase 2 Pre-screen Candidates	Phase 3 Interview Candidates	Phase 4 Candidate Starts
• Internet • Staffing firms • Employee referals • Job fairs	• Check clearances • Verify employment, experience, and education • Performance Assessment • Background check	• Verify best candidate for open position	• Training (as needed) • Badge • Orientation

All open positions are filled by **qualified** staff within **four days** through our certified staffing process.

P.A.Q.S.

Primary Objective:

Our approach (to system development) results in a secure SDLC solution, cost savings, and ensures full compliance (with 800 Series Guidelines)

Audiance:

DHS

Questions:

How do I get cost savings?

How much will I save?

How do you ensure compliance?

Who else have you done it for?

Before

Duration: 3+ Hours

Sketch

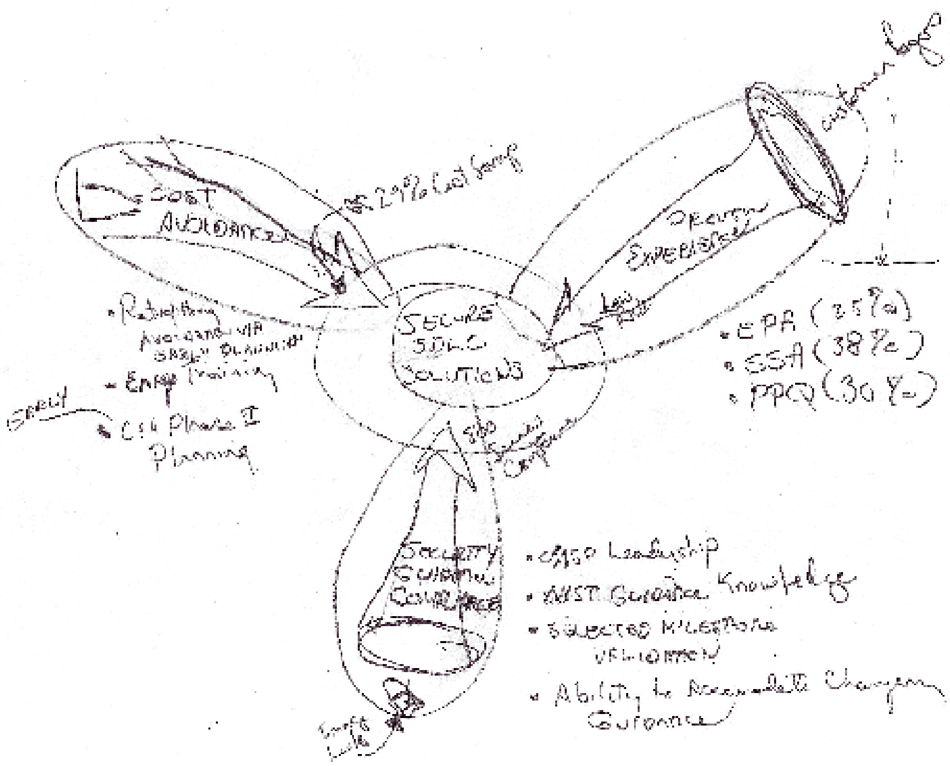
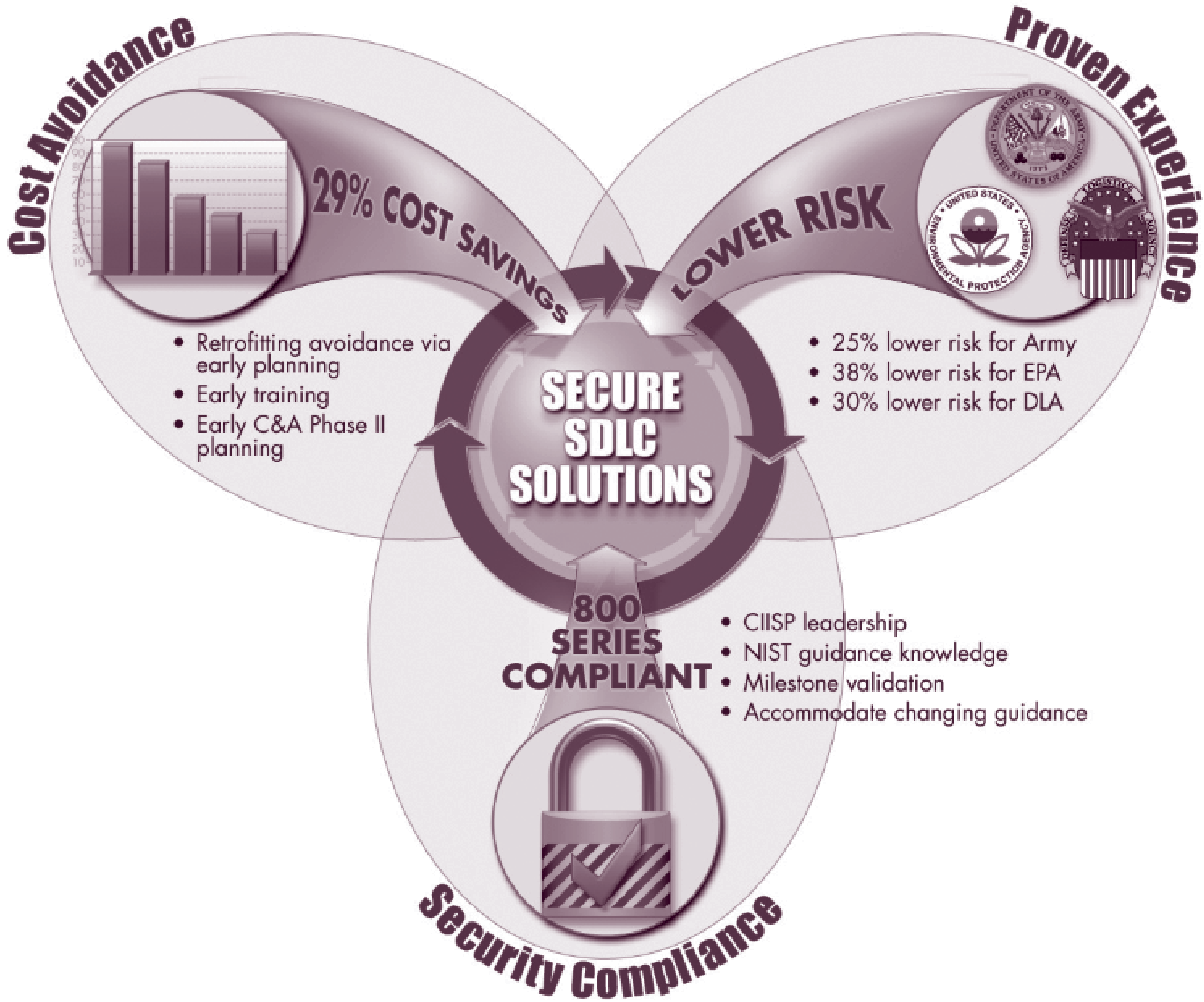


Figure 5. Sample “before” and “after” graphics.

After – Professional Render



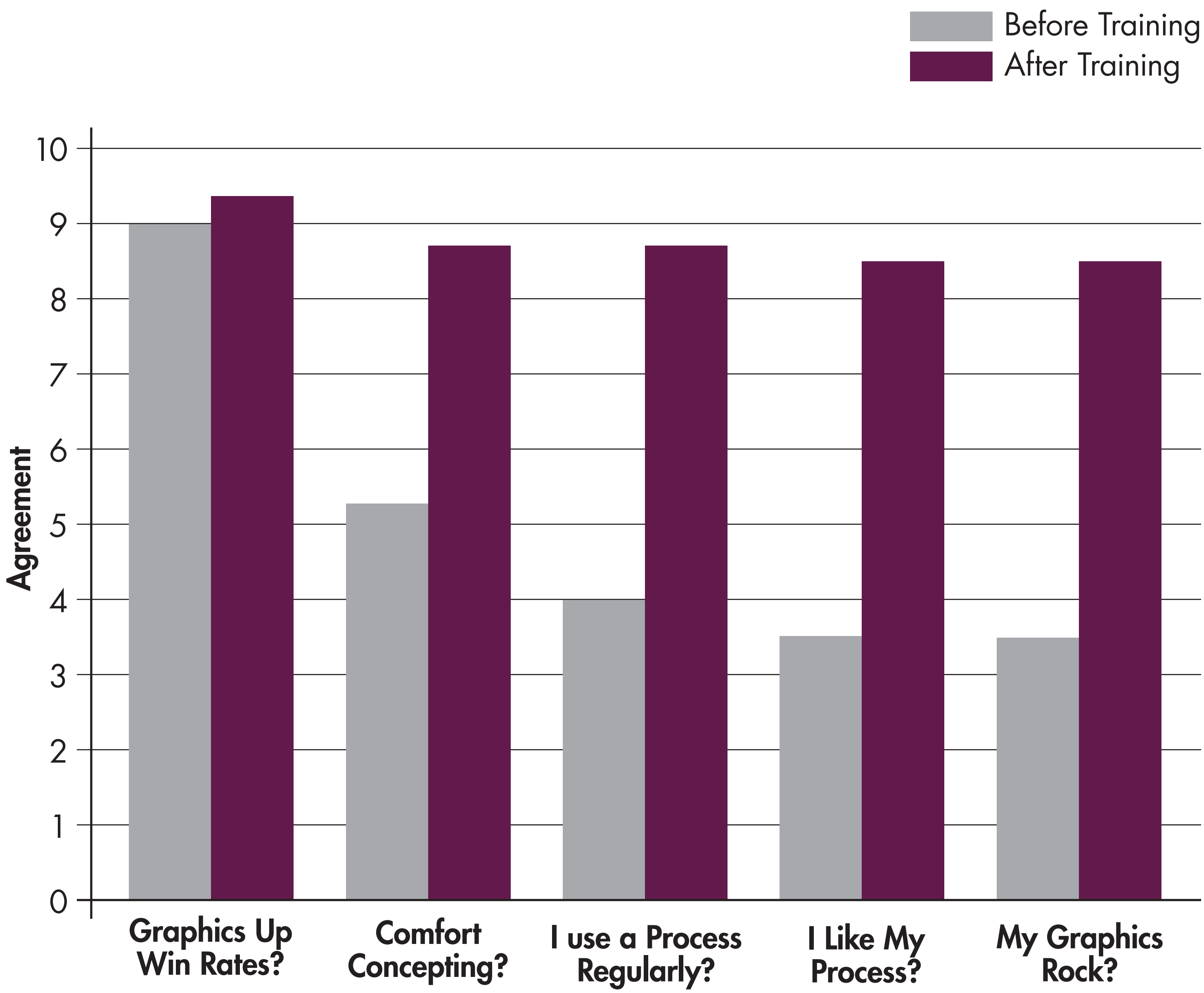


Figure 6. Measured results of the study participant before and after training show an improvement in overall criteria.

> *"The power in the process is that it eliminates rewrites, gets the message right, and validates your approach all at the same time. It really validates the whole proposal solution."*
>
> *–Bob Gillette, CRI*

Conclusion

In the end, the experiment successfully tested the validity and applicability of the process. It also proved to the volunteers (and the audience) that the process was easy to learn and it worked.

There were noticeable challenges associated with the experiment. First, due to time constraints and scheduling, each volunteer only had time to develop up to three graphics. As with any new process, practice makes perfect. It is my hypothesis that continued application of the process will result in improved results (time and quality). Second, I have only one data point on win rates associated with the graphics rendered during the study (it was a win). I was unable to collect additional data from other participants and their graphics. It is difficult, if not impossible, to remove all variables to test the efficacy of visuals developed with the process in regard to win rates. Although I have many statements from decision makers saying that the graphics submitted mattered, it does not quantify the impact visual communication has on a win.

This experiment proved that proposal professionals can learn to develop effective graphics for their proposals. The approach I have described is one that is promising and likely to work. Based on experience and the results of our study, I encourage you to adopt or develop a process-based solution to improve your win rates and increase efficiency (making work more manageable—imagine that).

Author Bio

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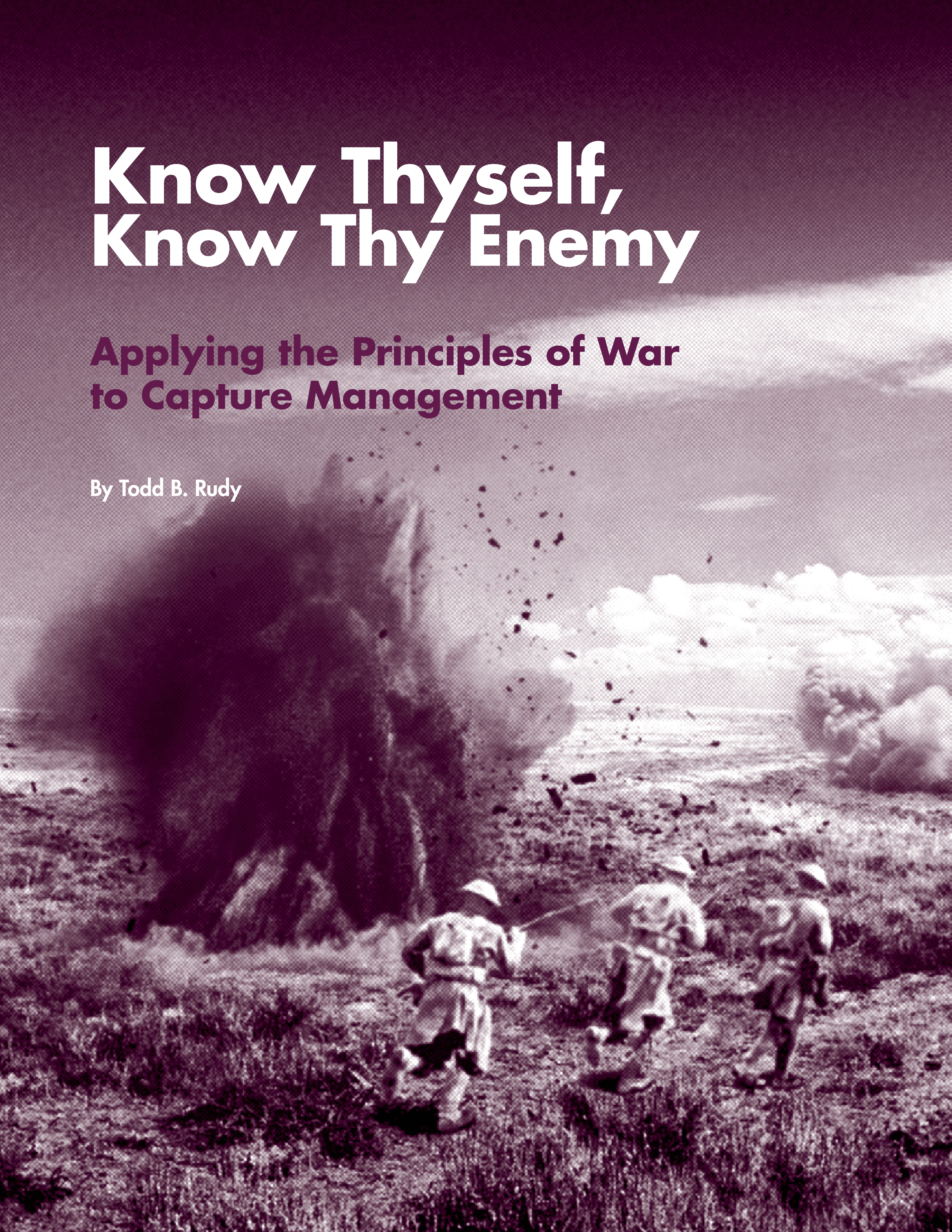
Know Thyself, Know Thy Enemy

Applying the Principles of War to Capture Management

By Todd B. Rudy



How can the principles of warfare described in the most recent The U.S. Army Field Manual FM 3-0 benefit capture managers?

In government contracting, we may tend to think of our competitors as "the enemy." Except for a possible trend analysis of potential bidders, however, we do not engage our competitors during capture. In the capture process, we fight a two-front war against two forces that have the power to utterly destroy our ability and will to fight. Those forces are one, the Government (our customer) and two, ourselves. The Government can slowly whittle away our resources and stamina through actions as varied as a seemingly unending barrage of amendments, a firm page number restriction, or the mixed blessing of a constantly moving due date. As for waging a war against ourselves, we face tight financial resources, misused personnel skills, overly and needlessly complicated processes, uneventful meetings, and teams working at cross purposes.

The combat engagement analogy may ring true in particular for defense contractors, as these companies often have a high population of former or retired military personnel. For us, some advice on how to manage our team's capture process—our persistent conflict pursuing lucrative contracts with elements of the US Department of Defense—may be gained from an examination of The U.S. Army Field Manual FM 3-0, that is referred to as the nine Principles of War. These principles, in one form or another, have been codified by major armies around the world. They present the modern warfighter with an arsenal of ideas aimed at securing victory on the battlefield. In capture management, these same principles can be applied to our activities to improve our chances of success and, just maybe, allow us to adapt to and overcome the challenges and threats posed by both the Government and our own team's process rigidity.

The nine Principles of War used by the US Armed Forces are cited below. Each principle is followed by ideas on how it can be applied to the capture process and to proposal management in general.

Objective

Direct every military operation toward a clearly defined, decisive, and attainable objective.

One keyword here is attainable. Even large companies are making cuts these days and need to have a good system to qualify opportunities and pursue those that present a higher win probability.

Once work on a winnable proposal pursuit has begun, directing your writing operations toward a "clearly defined" goal should result in a proposal document that presents its ideas concisely, in a logical order, and organized with appropriate headings and subheadings. This will make each volume easy to understand, and will provide individual bits of information that are easily locatable when scanned.

Every person on the pursuit team should go to every meeting, compose every email, and discuss every document with an understood goal to be achieved from the effort. If none is readily identifiable, that person should be spending time on something else. Companies often have a fixed structure of "pursuit procedure" milestones that are adaptable depending upon the size and scope of the proposal. This will avoid energies and resources being spent in purely ceremonial efforts.

Offensive

Seize, retain, and exploit the initiative.

Make good use of pre-solicitation time to review drafts of the pending Request for Proposal (RFP), build and organize the team, develop win themes and discriminators, solicit past performance documents from partners, etc. If you wait until the release of the final RFP, you will already be behind your competitors on Day One.

If you get an extension, use that time to make what you have better (within reason. The enemy of "great" is "perfect," where final proposals that have been extended ultimately become over-thought, over-written, and over-budget.)

Know your company's true strengths and discriminators, and make sure the customer knows them beginning with the proposal's introduction. Keep these selling points at the forefront throughout the proposal document.

Mass

Concentrate the effects of combat power at the decisive place and time.

In this business, we often work evenings, weekends, and holidays. Managing the proposal schedule to allow for a modicum of the participants' personal time (e.g., not holding teleconferences on Thanksgiving Day, even if you must hold one on the Friday after) helps to maintain morale and keeps team members functioning at their potential.

Unless the opportunity is an 8(a) small business set aside, a smaller company may be at a great disadvantage against larger competitors with more resources and reachback. Choose your targets carefully. If you saw the movie *The Patriot*, remember the advice "Aim small, miss small."

At the micro level, develop your flexible proposal schedule and manage to ensure availability of the right assets at the optimum time. This enhances efficiency and protects the budget.

Working on three similar projects is sometimes easier than working on two very different projects. Look for ways

to use team members' talents on efforts that involve the same subject matter and research. However, having variety in the workday is valuable: anyone who has spent the day proofreading or on another similarly tedious task knows that their work can get sloppy after several hours. For such tasks, allow people to work shifts (see Maneuver).

Economy of Force

Allocate minimum essential combat power to secondary efforts.

Do not require people to attend meetings or teleconferences if you are sure they do not need to attend. Their time is better spent continuing their respective workload on other efforts. Keeping people in the loop is valuable and respectful, but so is helping them manage their time. In larger companies, this can also help control the billable hours issue when charge codes are used, but no value-added work is being performed (see Objective).

Replace daily status meetings with weekly status meetings (if the due date allows), and let the capture manager be available 24/7 to take reports and solve problems if a problem arises. There is no need to have a meeting every day when the project is running smoothly, and have the entire team remain on the line as two or three people discuss a specialized issue pertaining only to them.

When technical writers or graphic designers have completed a group of tasks or are waiting on materials, have them reread the solicitation or their material to date. For example, writers can re-familiarize themselves with content requirements, and graphics personnel can review existing text to consider how another graphic might better explain or illuminate an idea and effectively replace text.

Maneuver

Place the enemy in a disadvantageous position through the flexible application of combat power.

Have ready a bank of back-up writers and graphic artists or past performance collectors, especially if your regular proposal team is small. In the event of a sudden illness, an unexpected pop-up opportunity with a quick turnaround, or other unforeseen events, your contingencies can see you through to success.

If another opportunity becomes a no bid, determine if any of those team members could add value to your effort.

Conserve your bidding budget. Multiple proposal extensions can cause a poorly funded or ill-managed competitor to curtail proposal development or even to withdraw from the competition. Your finances could help to keep you in the game.

Unity of Command

For every objective, ensure unity of effort under one responsible commander.

There should be a defined chain of command on every project, and every unit—writers, graphics, subject matter experts (SMEs), project managers—should have one person who is the understood point of contact and who distributes information downward.

There are three distinct values to a well-defined chain of command. First, it helps to reveal process and information flow weaknesses within your company, and it can strengthen the same when the command structure is strong. Second, when mistakes are made, it helps to isolate the

> *"Do not require people to attend meetings or teleconferences if you are sure they do not need to attend. Their time is better spent continuing their respective workload on other efforts."*

locus of that mistake to avoid future problems. Third, it alleviates the potential for employees on different teams or in different locations to work at cross-purposes when all significant decisions and information come from an expected and reliable source.

Security

Never permit the enemy to acquire an unexpected advantage.

Monitor all the solicitation Websites (e.g., FedBizOpps) religiously and ritually. Do not just visit the sites, and scan for updates. Have a method that ensures you see anything and everything that affects current and future opportunities.

Have more than one person read every amendment word-for-word TWICE. Then summarize and distribute all crucial changes to all need-to-know parties.

Host daily status meetings for proposals with a short turn-around; host weekly status meetings initially for those with a longer turn around (more than 30 days), dropping to daily toward the end of the schedule if required.

When using an online document sharing forum like SharePoint™, incessantly emphasize the importance of checking-out documents to protect the last writer's work and avoid people working at cross-purposes and losing version control.

Be careful what materials you share with teaming partners. A company you are partnering with today may be a company you are competing with tomorrow. Any materials generated by your team and shared with the partner might not only be reused by them in a subsequent bid, but could give that company insight into your methods, procedures, and resources. Similarly, be wary of what documents are posted on online collaboration sites, and be knowledgeable about the security available to safeguard access to different documents.

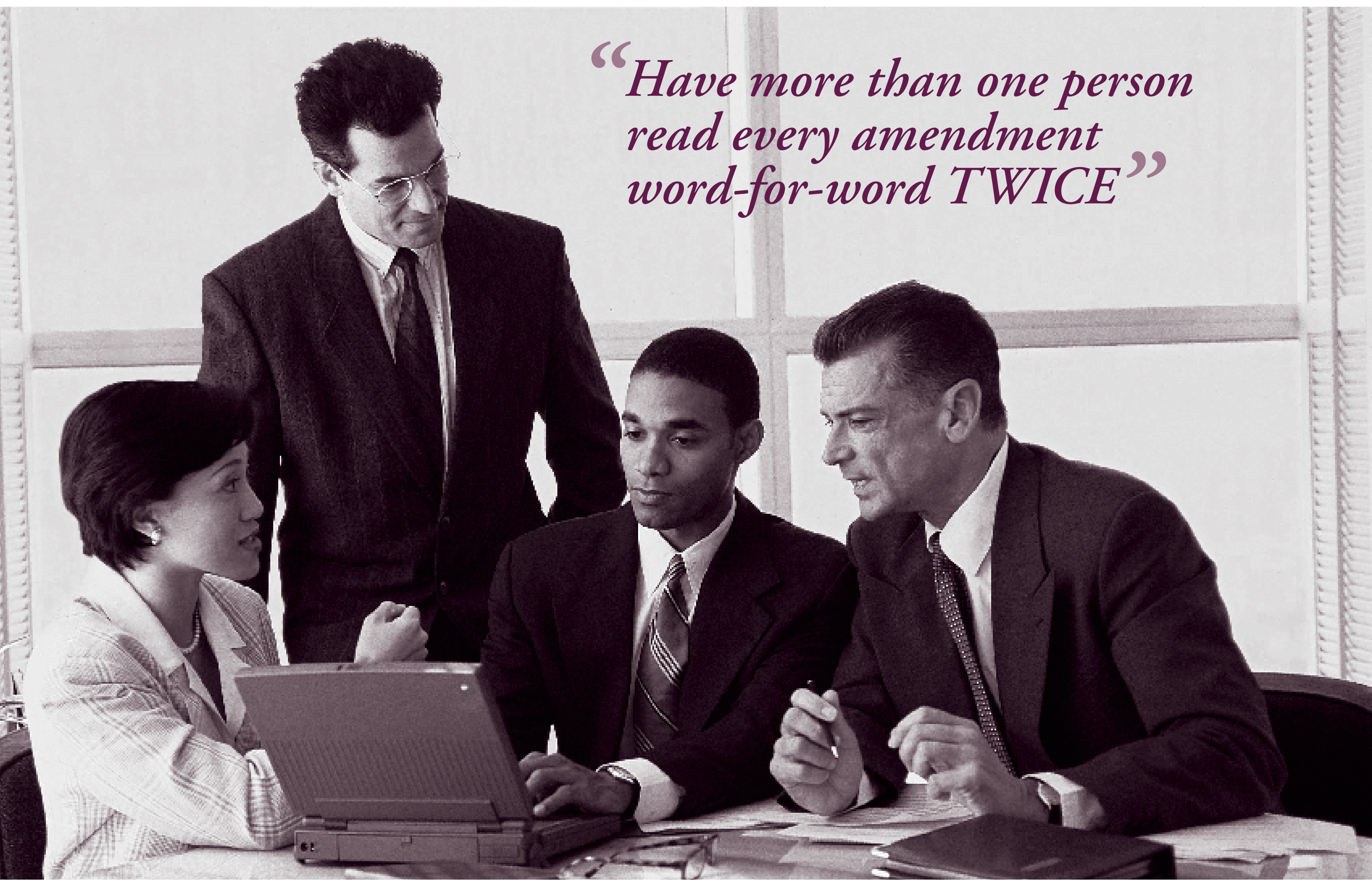
Make sure your employees know that when attending APMP chapter dinners and other such professional affairs, never to discuss any current or pending proposals.

Surprise

Strike the enemy at a time or place in a manner for which he is unprepared.

Determine your discriminators—those elements of the proposal that cause the evaluator to say "wow, this company really knows what it is talking about" or "golly, this company has a benefit head and shoulders above the competitors." These can be tangible benefits, such as remarkably similar past performance or intangible benefits like having never been investigated.

Consider providing a benefit the customer did not request, either at no cost or for a cost you are certain the customer is



willing to absorb (usually applies only to proposals rated on the best value basis).

Simplicity

Prepare clear, uncomplicated plans and clear, concise orders to ensure thorough understanding.

Just because you have a 50-page limit does not mean you should work toward filling those pages like an empty vessel. Similarly, avoid the desire to write everything you wish and then seeing how much you can trim, stopping right at the last line of the 50th page (whether all the remaining information is needed/necessary or not). Say it once, say it well, and then move on.

The evaluator should not have to think when reading your proposal. Your text and graphics should be so simplified and stripped down that even the uninitiated can understand your technical processes and components.

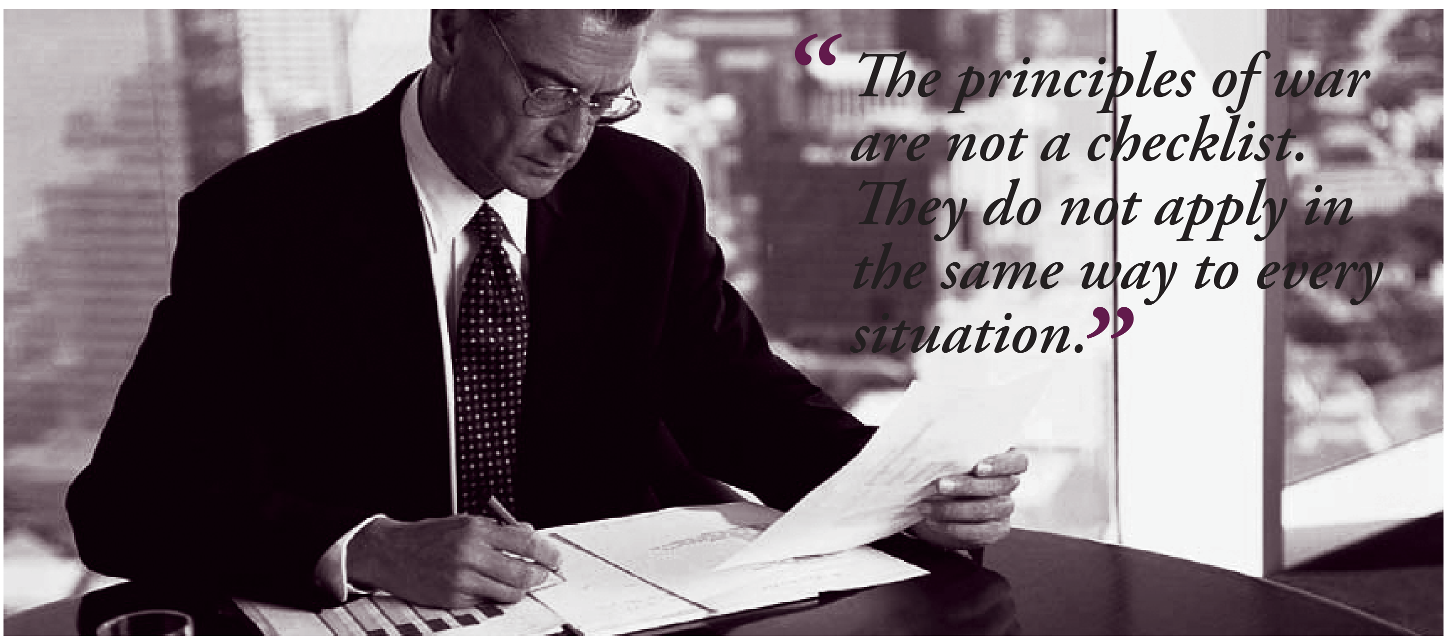
If a graphic such as an organization chart starts to become overly complicated, see if there is a way to divide the organization into two tiers or two halves, and these then become two separate graphics.

In our business, we often say that we are "pursuing an opportunity." The word pursuit implies that the opportunity is in a constant state of retreat, which in a military sense means the opportunity is escaping our attempts to conquer it (and in military history can sometimes be leading us into a trap). This appears most true when we cannot seem to overcome last-minute and unending revisions to the Government's solicitation, poor organization and planning within the capture team, or the myriad other challenges we face as part of our pursuit process.

We should remember, however, that just as we must adapt and remain flexible in combat situations, these Principles of War are equally adaptable to the changing battlefield of capture management, as are the lessons we might take from them. From Paragraph 4-34 of the field manual:

"The principles of war are not a checklist. They do not apply in the same way to every situation. Rather, they summarize the characteristics of successful Army operations. Their greatest value lies in the education of the military professional. Applied to the study of past campaigns, major operations, battles, and engagements, the principles of war are powerful tools for analysis."

New opportunities bring with them a new spectrum of challenges, obstacles, and shortfalls. However, by taking the lessons we learned as soldiers about how to organize our forces to wage a successful campaign, our efforts managing the capture process are much more likely to lead us to victory.



RESOURCES

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U.S. Department of the Army. 2001. Field Manual No. FM 3-0: Operations. Washington, DC: Headquarters, Department of the Army.

http://www.dtic.mil/doctrine/jel/service_pubs/fm3_0a.pdf

Author Bio

Todd B. Rudy spent eight years teaching university-level English literature and creative writing before becoming a technical writer for Lockheed Martin's mission area Sustainment and Health Services, where he has been since June of 2008. Previously, he served in the US Army as an M1A1 Abrams tank crewmember. (todd.b.rudy@lmco.com)

Source Selection Sudoku

How is the popular number puzzle Sudoku like the source selection factors that reviewers use to evaluate your proposals?

By: Jim Hiles & Earl Wells

Sudoku is a popular number puzzle. A 9x9 cell grid with some cells already completed is provided to the puzzle solver who then fills in the remaining cells. There are rules/limits on which number goes where. The solver is trying to get the numbers 1 through 9 to occur exactly once in each row, column, and 3x3 box. Amazingly enough there is more than one possible correct answer to a given puzzle.

This is not unlike the puzzle that confronts a proposal manager responding to a Government Request for Proposals (RFP). Evaluation factors (RFP Section M) are presented, along with specific ordering and weighting information, as well as instructions and guidance (RFP Section L) on how to organize the response. The proposal manager has to determine how to best respond based on the limited amount of information present—information that is frequently inconsistent. There are many possible answers, only one of which will be determined to be the best by the proposal evaluators.

In a recent APMP research project sponsored by the APMP National Capital Area Chapter (NCA), 321 government RFP preparers responded to a survey to determine how they selected, applied weight to, and used source selection factors in evaluating proposals. In a separate survey, 198 APMP NCA members responded to questions concerning how they interpreted and used evaluation criteria in shaping proposals.

This research project sought insight into:

- How and why RFP preparers select and order source selection evaluation factors
- How to interpret RFP evaluation factors
- Evaluation factor weighting and ordering
- How to use evaluation factors in responding to RFPs
- Best practices to analyze source selection evaluation factors.

The intent of this article is to focus on the observations and recommendations beneficial to RFP responders.

Description of Study and Surveys

The existing body of knowledge on source selection evaluation factor selection and ordering is large, fragmented, and not all found in one convenient location. There are public laws, Federal Acquisition Regulations (FAR), and agency guidance (e.g., Defense Federal Acquisition Regulations [DFARS]) on source selection evaluation factor selection, ordering, and communication to offerors. There is a wide breadth of understanding of this body of knowledge and guidance in the universe of RFP preparers. Which specific source selection evaluation factors are included in an RFP and how they are weighted/ordered and communicated is informative to proposal and capture teams. There are tools and methods to analyze and understand the specific source selection evaluation factors used and their ordering/weighting in an RFP.

Two survey tracks were concurrently pursued in search of answers: a survey of RFP preparers and another of RFP responders. This research project set out to answer the following questions:

1. How do government RFP preparers choose source selection evaluation factors?
2. What qualifications do these preparers have?
3. How much effort is put into evaluation factor selection, weighting, and ordering?
4. What does the selection, ordering, and weighting of source selection evaluation factors tell us about an RFP and the best response?
5. How should RFP evaluation factors be analyzed and acted upon?
6. How do proposal responders analyze source selection evaluation factors and use them in planning/developing their proposal?
7. Do RFP responders assign mathematical values to evaluation factors?
8. Do RFP responders believe that a best practice exists concerning the evaluation and use of source selection factors, and if so, what is it?

Survey Question Summary	
RFP Preparers	RFP Responders
Demographics	Demographics
Training	Training
Experience	Experience
Methods	Methods
Expectations	Best Practices
Usage	Usage
Satisfaction	
35 Questions	18 Questions
20 questions allowed narrative responses	1 question allowed narrative responses for “Best Practice”
Survey Response Rate	
910 Narrative responses entered by 321 respondents	103 Responses entered

Figure 1. RFP preparers and RFP responders responded to specific surveys.

Our study methodology, which involved the following steps, is discussed in more detail below:

- Reviewing the literature/Internet search concerning source selection factor design and use
- Developing separate surveys for RFP preparers and RFP responders
- Conducting surveys and collecting responses from the two respondent groups
- Analyzing the survey results and developing conclusions
- Preparing a Professional Day presentation.

Initially a Body of Knowledge Review was conducted to determine which source selection factors regulations have to be used (FAR and DFARS), to catalog RFPs (specifically Sections L [instructions to offerors] and Section M [evaluation criteria]), and to review current wisdom/leading thought (what is being taught, what books and course material are being used).

The RFP preparer survey was completed by 321 respondents, including contracting officers, contract specialists, program managers/CORs/COTRs, and managers of source selection functions. This survey consisted of multiple choice answers with some narrative fill-ins. Potential respondents were obtained from publicly available records of government personnel associated with acquiring goods and services.

The RFP responder survey was completed by 198 respondents drawn from the APMP NCA membership roster, and included both corporate and independent proposal professionals. A higher percentage of RFP responders than RFP preparers completed the survey, possibly due to the more focused candidate list and, therefore, higher interest in the topic.

Survey questions were organized in seven categories for RFP preparers and six categories for RFP responders. Figure 1 summarizes the survey questions.

A noticeable contrast emerged in the demographics of the two surveyed groups. The RFP responder group had more experience, education, and training than the RFP preparer group. The RFP preparer group was predominantly at the GS-12 level, 90 percent had a bachelor's degree (only), and either had more than 15 years' experience or less than 1 year experience choosing evaluation factors. The RFP responder group, on the other hand, predominantly had more than 10 years' experience responding to RFPs; 90 percent had bachelor's degrees, and 46 percent also had a master's or PhD.

Survey Findings

Dedicated Sudoku solvers trace the lineage of their game to the concept of Latin Squares. The quest for meaning behind the origination and evolution of their pastime can lead to deeper understanding of Latin Square-related concepts including error control as a technique to enable reliable delivery of digital data over unreliable communication channels.

A point of deeper understanding gained from the body of knowledge review undertaken in this research study is that the evaluation factors familiar to most RFP responders and preparers

RFP Preparers	RFP Responders
• Are unlikely to have formal training on source selection factors	• Are formally trained and mentored with 10 or more years' experience
• Develop RFPs with forethought and specific requirements	• 50% state that "Section L Rules" for proposal development
• Say mismatched Sections L and M do not exist in their RFPs	• Many feel that Section M trumps Section L, and the proposal must be organized by evaluation factors
• Rely on agency practices and locally developed guidelines	• Evaluation factors always heavily influence the proposal
• Are influenced by requirement owner` regarding source selection factors	• For many, the degree evaluation factors are used depends on an analysis of the RFP
• Believe more factors result in more work	
• Think offerors could be reading too much into the factors	

Figure 2. Highlights of study finding for RFP preparers and RFP responders.

(e.g., technical approach, management approach) are not mandatory factors. The body of knowledge review indicated that in a Federal Government RFP, there are five "mandatory" evaluation factors:

- Price or cost to the Government
- Quality
- Past performance
- Small disadvantaged business participation
- Small business subcontracting.

However, there are rules that allow exceptions. For instance, the two small business criteria do not always apply, use of past performance as an evaluation factor can be waived, and quality can be evaluated using other factors as a proxy. Taking this into consideration, most contracts can thus be awarded on the basis of three factors: 1) acceptability of the offer (where the offeror accepts the terms, proposes adequate small disadvantaged business participation, and is eligible for the award), 2) risk, and 3) either price or cost and fee. Thus, there are minimal constraints on what must be included as an evaluation factor, and there are no prescribed limits on additional factors. In the majority of cases, RFP preparer survey respondents indicated that they did not consider themselves to be constrained or limited in choosing source selection evaluation factors. In this manner, the survey responses corroborated the body of knowledge review findings.

RFP preparers were asked what they refer to or read when selecting evaluation factors. RFP authors stated that they refer to agency instructions and prior solicitations very frequently (66 percent of the time) when developing source selection factors. Reaching for a prior solicitation carries with it the negative connotation that a thoughtful evaluation of the selected factors is not occurring. This survey response is significantly higher than many would consider desirable and likely contributes to Section M language copied from predecessor RFPs. This also potentially contributes to disagreement among Section L (RFP instructions to offerors), Section M (RFP evaluation criteria), and the associated SOW (Statement of Work).

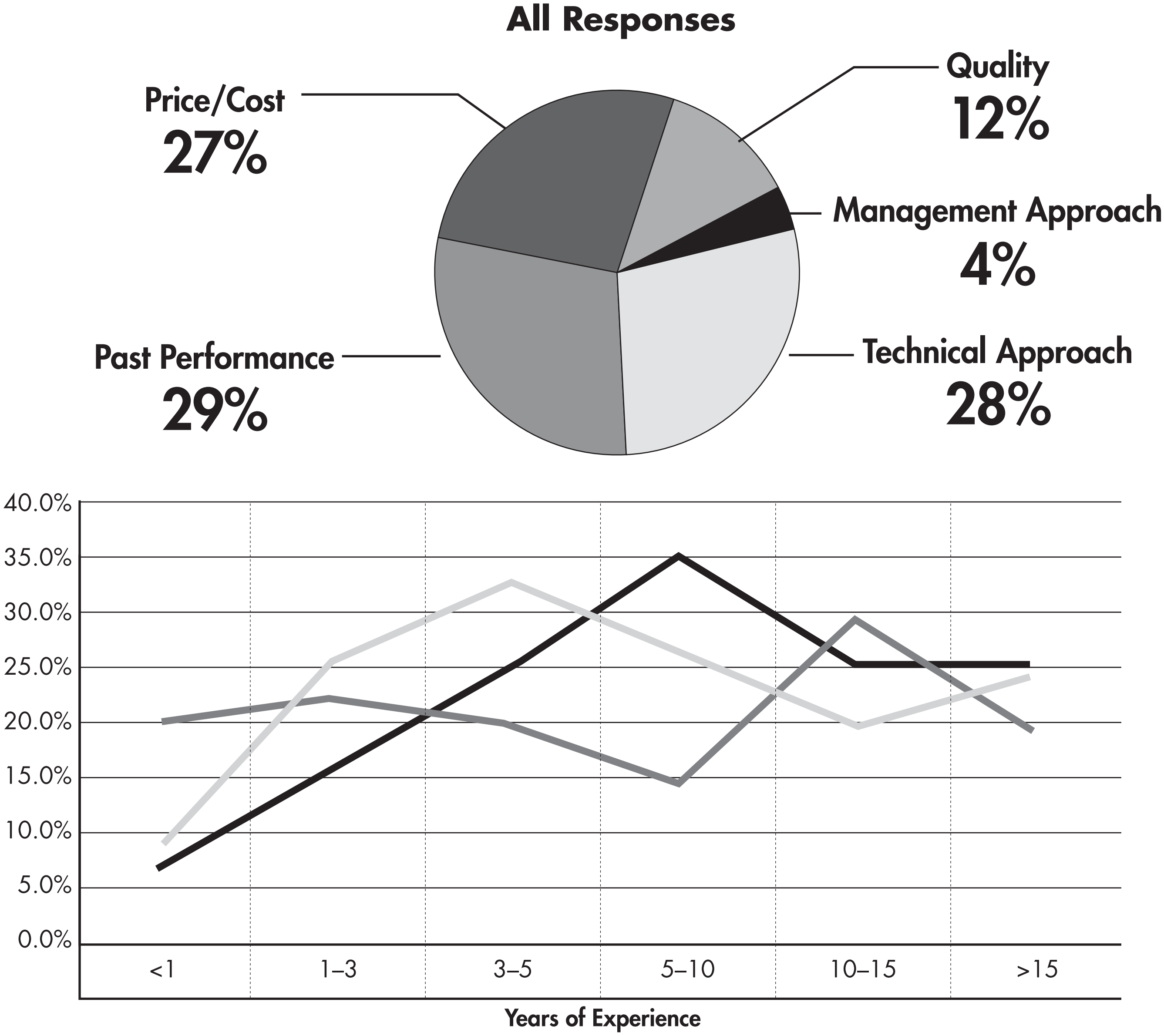


Figure 3. Of the five factors surveyed, Past Performance, Technical and Price are used most frequently.

The survey found that 65 percent of RFP preparers have had some type of formal training—either private training, an agency course, or Defense Acquisition University (DAU) training. A detailed review of the survey responses revealed that 25 percent of the respondents have had no training relevant to source selection factor selection, with 8 percent having only on-the-job training (OJT). Of the survey respondents, 33 percent have no formal training on selecting evaluation factors. A possible explanation for this is based on who actually selects evaluation factors. The researchers were expecting to find that contracting officers were the selectors of evaluation criteria. Survey results and telephone interviews indicated otherwise. In the majority of instances, those surveyed indicated that they deferred evaluation factor selection to the requestor, likely a technical community member or program/project manager, although contracting officers and specialists are the primary attendees of formal training that covers topics such as source selection evaluation factors. The technical community by and large focuses on their respective specialties. This means that evaluation factor decisions are being made by those in the best position to judge the veracity of a proposed solution; however, it also results in evaluation factor decisions being made by those with the least training in the subject.

Since 1992, past performance has been a "mandatory" source selection evaluation factor and received a lot of attention and emphasis during the numerous Federal acquisition reforms over the last 15 years. When asked what factors are considered when selecting evaluation factors, it is not surprising to see past performance elevated as the most considered factor. The illuminating survey result from this survey section was that the proposed management approach was both considered and used the least. This was not an expected result but was clearly revealed by the survey responses. Management approach was the least used evaluation factor, regardless of years of experience or training of the RFP preparer. Management approach was also cited as being the least effective factor for discriminating between offerors.

Of particular interest in the survey was the strength and direction of the relationship between which source selection factors were used the most or the least as contrasted with years of respondents' relevant experience. RFP preparer survey respondents with fewer years of experience rely on price more frequently than other factors. As experience is gained, price becomes less important than other factors. Technical approach, past performance, and price were cited as the most used factors by all RFP preparer survey respondents. However, the more experience an RFP preparer had correlated to a higher likelihood that the ordering and frequency of use of the top three factors was Technical, then Past Performance in a tight grouping, and then a sizable gap down to the third most used: Price/Cost. At lower levels of experience, the top three factors used in descending order were Price, Past Performance, and Technical.

Aside from the least used management approach previously mentioned, the other notable least used evaluation factor cited by survey respondents was quality. Quality was cited as not being useful in source selection and as most likely to be evaluated by proxy via a different factor or as a subfactor.

Two measures of satisfaction measured in the RFP preparer survey were satisfaction with local process and guidelines for evaluation factor selection, ordering, and weighting; and satisfaction with the results obtained from evaluation factor selection. Of the respondents, 60 percent indicated satisfaction with local processes and procedures. Of note is that in detailed interviews conducted and in narrative survey responses, the most common local guidance was not formalized in an agency instruction, but was more likely to be a draft or training session notes that were recognized as outstanding and kept for reference. Sixty-eight percent of respondents indicated that the proposals they received convinced them that the offerors understood the meaning behind the evaluation factor selection, ordering, and weighting used in the RFP.

A similar measure of satisfaction was expressed in the RFP responder survey. RFP responders were asked how often their analysis of evaluation factors convinced them that the RFP preparer used considerable effort/judgment in choosing, ordering, and weighting source selection factors. Including the majority that responded "occasionally" in this group, 80 percent of the RFP responders felt that the RFP preparer used true effort and judgment in choosing the factors—"some of the time" ("some of the time" includes the response categories of both occasionally and frequently). A relatively small percentage felt that effort was seldom or never expended (14 to 15 percent indicated in their responses that they wondered if anyone ever reads the factors). It can be concluded from this that most RFP responders believe the author seriously considered the evaluation factors provided in the RFP.

When asked "how" they used the evaluation factors, almost all RFP responders use these factors in multiple ways—only 2 percent indicated that they did not use the evaluation factors in any significant way. The most frequent uses include:

- To outline the proposal (80 percent)
- To allocate page count (68 percent)
- To develop win themes (67 percent)
- To create red team review instructions (70 percent).

How Factors are Used?

Comparing Expectations of RFP Preparers to Approach by RFP Responders

RFP Preparers Expectations		RFP Responders Approach	
Review to Pick Out General Theme and Intent	64%	Review to Identify General Themes for Proposal	53%
Deep Study and Mathematical Analysis	21%	Assign Mathematical Values/ Ranges	51%
Often Wonder if Anyone Reads them at All	15%	Often Wonders if RFP Issuer Read Them	14%

Although general agreement exists on how the factors are used, Responders assigned mathematical values in far greater numbers than the Preparers expected.

Figure 4. RFP preparers and responders disagreed on the assignment of mathematical values to evaluation factors.

A significant number of responses stated that the degree that the evaluation factors influence the proposal is dependent on the information provided.

RFP responders indicated a high level of participation in training. No more than 5 percent of respondents replied that they had not received training of any type that was relevant to source selection evaluation factors or to the purpose of interpreting them in an RFP. Looking deeper at the detailed responses, 84 percent of the respondents had attended at least one formal training course as well as OJT. The typical RFP survey respondent is formally trained in proposal development and also has OJT.

The sole narrative response fill-in on the RFP responder survey asked respondents to describe "best practices" related to the analysis and use of evaluation factors in proposal preparation. Of all respondents, 73 percent believe that there is a "best practice" concerning the use of evaluation factors. Detailed narrative answers were provided by 103 of the 198 participants. A clear majority state that Section L, Instructions to Offerors, must dominate when formulating the proposal and that the evaluation factors need to be integrated into the instructions. A minority suggest that Section M, Evaluation Factors, rules when developing the themes, outlines, and page allocations. A few said "it depends"—articulating what many of us may frequently feel—that how we use the factors really depends on the amount and quality of information provided in the RFP.

The majority of both RFP preparers and responders agreed that, when developing the proposal, the factors should be used to identify the general theme and intent. However, when asked about assigning mathematical values or percentages to the factors, a significantly larger number of responders (51 percent) assign values to each of the evaluation factors. This is much higher than RFP authors expect (21 percent).

The majority of RFP responders advocate and follow generally accepted "best practices" related to the use of the instructions and evaluation factors. They use the factors in multiple ways to support proposal development. Even if they do not believe the factors are particularly relevant to the bid, they still use them to influence the proposal. RFP responders also spend considerable effort on the analysis of the evaluation factors—but the degree to which the evaluation factors are used is tempered by the amount and quality of the information provided in the RFP.

Recommendations for RFP Responders

There were several standout observations that lend themselves to identifiying recommendations for success for the RFP responder group.

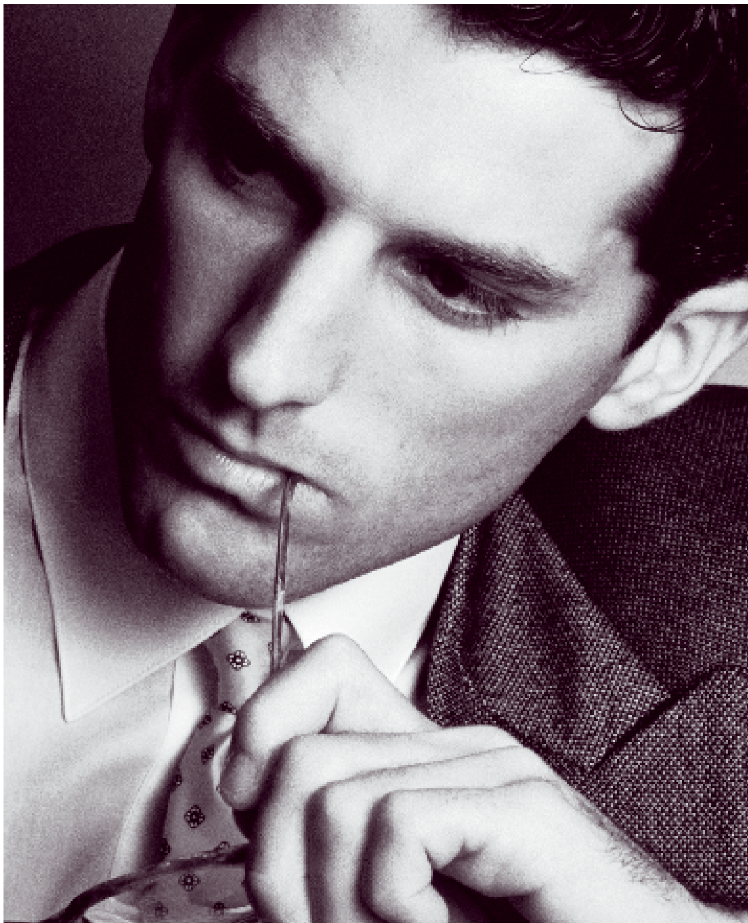
Ensure that the Instructions to Offerors, Evaluation Criteria, and the SOW Match

The number one issue cited by RFP responders is that frequently RFP Sections L, M, and the SOW do not match. RFP preparers believe that this is not the case for THEIR RFPs! This is a striking mismatch in answers from both parties. The number one cited place RFP preparers look or refer to for source selection evaluation factors is "the previous solicitation." This point was revisited during telephone interviews. Although the RFP preparer's responses stated otherwise, there is likely a fair

Best Practices–RFP Responders

- Best Practices - RFP Responders
- Knowledge of customer is key; learn how they use factors in managing evaluations, and do not "read too much" into them.
- Compare/analyze L and M. If they do not match, ask questions early.
- Use Instructions (Section L) to develop a high-level outline, and integrate evaluation factors (Section M) into this outline.
- Use evaluation factors to develop the win theme and strategy.
- Evaluation factors should guide the page allocation and content.
- Shape the executive summary to address the evaluation factors.

Figure 5. Recommendations to RFP preparers based on study findings.



amount of replication ("closet copying") occurring during RFP preparation, which contributes to Section L, M, and SOW mismatches.

If this closet copying was eliminated and an understanding of the market and offeror differentiation points was applied to evaluation factor selection, we would expect to see factors that are consistent with the requirements and that better discriminate between offerors. Considering the frequency of RFPs that have Sections L and M that do not match, it is clear that this needs to be reviewed and questioned early enough in the response cycle to be corrected.

Temper Your Response with Knowledge of the Customer

Responders must temper their RFP analysis with knowledge of the customer and how that customer uses evaluation factors. Based on the input of RFP preparers, it is important "not to read too much" into the source selection factors. The message here is not to over-analyze the evaluation factors, but to respond to them in a manner that accommodates three evaluation targets: compliance with proposal instructions, satisfying checklist-style evaluation, and providing thoughtful responses that resonate with the requirement owner.

Outline to the Instructions to Offerors, Theme to the Evaluation Factors

While there is a group of responders that feels "Section M rules," the consensus best practice is to develop the outline based on Section L and to integrate topics from the evaluation factors into this outline. This makes it even more important to clarify any mismatch between Sections L and M. Best practice proposal outliners rely on Section L to develop a high level outline, and integrate the Section M evaluation criteria into this outline.

Address the Evaluation Criteria in your Executive Summary

Almost all respondents agreed that evaluation factors need to be used to develop the win strategy and themes, and to influence proposal page allocations. Many responded that the executive summary should directly address the evaluation factors. The customer's written evaluation criteria are the important factors that enable them to discriminate between offerors. As part of a response in which your capabilities, approach, and win themes connect with what the customer has told you they care about the most, your executive summary sets the tone of your proposal. It needs to crisply and clearly state why you are bidding and what benefits the customer will realize if your firm is selected.

In Britain, *The Times* published the first Sudoku puzzle in 2004, receiving a letter the next day from a subway rider complaining that the puzzle had caused him to miss his stop on the Tube. In 2008 an Australian drugs-related jury trial costing more than $1M was aborted when it was discovered that 5 of the 12 jurors had been playing Sudoku instead of listening to evidence. Interpreting and responding to RFPs can be as equally compelling. Unlike Sudoku, however, quantitative over-analysis does not appear to be the surest path to success.

"Based on the input of RFP preparers, it is important "not to read too much" into the source selection factors."

Authors Bio

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Just Say No? Nah! Best Practices for No-Bids

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Go/No-Go

A proposal is an investment of time, money, personnel, facilities, and other resources intended to produce a return of cash. Any proposal opportunity, then, that is not likely to produce cash, or enough cash, does not warrant an investment. But walking away from a specific opportunity does not mean walking away from the customer. In this article, we review best practices for making the go/no-go decision, discuss steps to take that leave the door open for new opportunities, and explore the concept of metrics for determining whether the no-bid decision was the correct one: measuring what was not done.

Like every other aspect of the proposal process, the bid decision is constrained by time, money, personnel, facility availability, and (most certainly) incomplete information. To a certain degree, the decision is based on opportunity costs: If we pursue this opportunity, will we have the capacity to pursue another opportunity concurrently or later? There are only so many hours and dollars available for proposal work, so they must be used to the best effect as a way of managing an organization's overall portfolio. Some organizations have formal, data-driven scoring systems for determining whether to go forward. Others base the decision on factors that are more difficult to quantify—market intelligence, for example. Sometimes it can be appropriate to go forward even if the likelihood of winning is small, perhaps to establish oneself as a competitor in the market or to gain the attention of a sought-after customer. At the University of California, Riverside (UCR), we often pursue opportunities with win rates in the 4 percent neighborhood. The money on the table does not nearly justify the effort involved in the pursuit, but the prestige that comes with these awards does. More often than not, we lose. But we also win, because we have established ourselves as contenders among much larger and better-known academic institutions, and we have moved on to a first-name basis with the program officers. A loss today can set up a win tomorrow. As we will discuss, a no-bid today can do that too.

Getting to No

The decision on whether to go forward is always a judgment call—easier for some opportunities than for others, but always a judgment call. Further, a bid decision (as opposed to a no-bid decision) is rarely a clear-cut done deal. Typically, the bid decision is made with caveats: conditions that have to be met through some corrective action before the decision to go ahead is final. In other words, a bid decision is often a statement that the opportunity can be won, if the bidder takes certain actions to raise the probability of a win to an acceptable level. As such, the objective should be that the bid decision is as fully informed as possible. This objective is most consistently realized when the bid decision is an integral part of a well-structured capture process that has certain key characteristics:

1. The capture process ensures that an initial bid decision (sometimes at this early stage called a pursuit decision) is made early enough to allow time to identify and execute any actions required to win, influence the content and direction of the solicitation, and vet solutions with the customer sell points.
2. The capture process should provide multiple decision point gates (may also be called steps) that consider changing competitive conditions with a confirmation that satisfactory progress is being realized with the actions required to win.
3. The multiple bid decision gates should include the discipline of looking at a consistent set of competitive factors, with each decision gate building on and following from the prior gate.
4. The capture process ensures the right members of the management and operations team fully participate in each gate review.

The precise structure of the capture process is driven by the process maturity of the firm, the size of a company organization, its management culture, the diversity of its business base, and other factors. Often, a portfolio management structure is used as an overlay for the capture process to assess the appropriateness of an opportunity and to appropriately weigh the different factors that go into the bid/no-bid decision (see sidebar). A key element of a capture process is the number of review gates, including the timing and objective of each gate. Some processes involve literally dozens of gates; even if some are not relevant, they are designed to ensure that the management team has not overlooked any important issues. At a minimum, a set of gates would include:

- Qualify an opportunity
- Make a formal pursuit decision
- Make a formal bid/no-bid decision at or near the time that the request for proposal (RFP) or other solicitation document is released.

Each of these gates includes a bid decision. The process and the gates should facilitate rigor of communications and analysis, to result in the fully informed aspect of the bid decision judgment. The most crucial bid decision inflection point is the third, since at that stage the most information is available; it comes just before the proposal effort ramps up and the spend rate dramatically increases. Further, once the effort to develop, write, and produce a proposal begins, it becomes

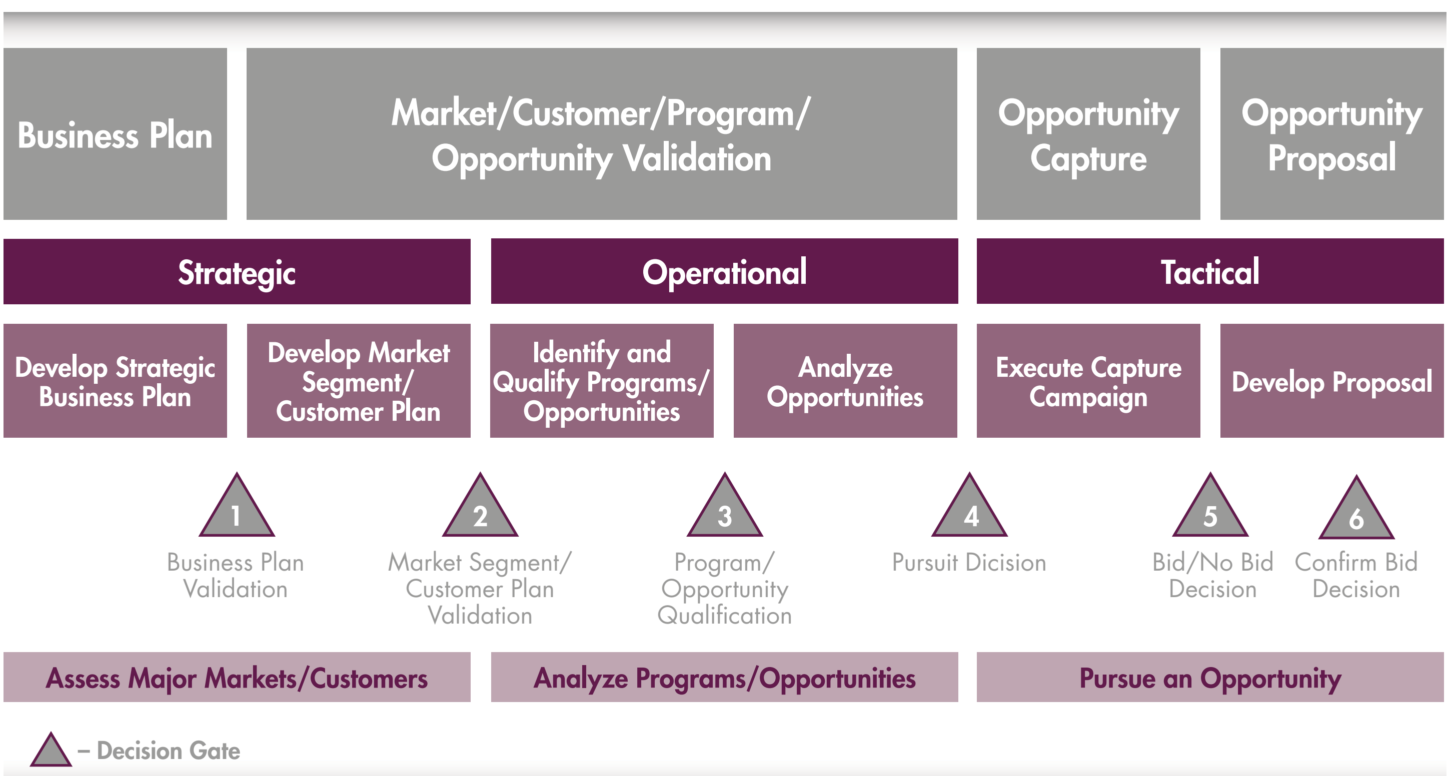


Figure 1. Bid decisions are most effective when part of a well-structured process.

increasingly difficult to kill the effort and reach a no-bid decision because it would guarantee no return on the investment that already has been committed.

Figure 1 shows a representative capture process with elements to ensure alignment with business strategy and effective marketing prior to the decision to pursue a particular opportunity. The bid decisions in the figure occur in gates 3 through 6. Gate 1 completes or updates the business plan, while gate 2 completes development of marketing plans for business segments and major customers. Again, most effort and costs are incurred during the tactical gates where the opportunity capture and proposal development work occur. A well-structured overall capture process helps ensure that capture and proposal costs are spent on well-qualified opportunities. Further, and importantly, a well-structured process should provide a thorough and timely appraisal of a consistent set of win factors. Although a bidder's win factors are generally consistent overall, there is no one-size-fits-all set of win factors. Every opportunity is unique, and the win factors at each decision gate should reflect this.

A representative set of win factors is shown in Figure 2. Each factor is assessed using a simple green/yellow/red grading scheme. More complex quantification schemes with a cutoff based on a numerical total score tends to convey a false sense of accuracy and obscure the fact that this analysis is fundamentally an experience-based judgment call. To the extent the process drives an analysis that is thorough and considers substantive, relevant information, the judgment call is increasingly reliable and effective.

How Green Was My Decision Matrix

It is rare for a given opportunity to grade all green in the initial assessment. For each non-green factor, the object is to determine a feasible get-to-green plan for the factor. The more time available for get-to-green actions the better, so it is important to perform the initial assessment sufficiently early in the process to provide enough time to green up the factors. Of course, one potential conclusion at any given gate is that there is no viable way to get one or more of the win factors to green. In those cases, a no-bid decision is usually in order.

Figure 2 represents a presentation-style summary of the win factors. Beyond this summary, there should be more substantive details for each get-to-green plan, including budgets, milestones, and responsibility assignments.

While the specific set of win factors should be tailored to the needs of a given organization, one factor that should not be included in this analysis is past performance. Referenceable past performance should be a hurdle cleared as part of qualifying the opportunity, a step that occurs before the gated analysis of win factors. If a given opportunity does not score green with past performance, there is almost never time to get this factor to green before the opportunity matures to RFP release. As for the representative factors shown in Figure 2, there are a number of considerations related to each factor, including:

1. Customer Insight. The eventual proposal has to display credible understanding of the customer's technical and programmatic requirements both today and going

Key Win Factors		
Consumer Insight	RED	Explanation of Status, Get to Green Notes
Competitive Assessment	YELLOW	Explanation of Status, Get to Green Notes
Team/Organization	GREEN	Explanation of Status
Baseline Solution	RED	Explanation of Status, Get to Green Notes
Risk/Program Management	YELLOW	Explanation of Status, Get to Green Notes
Deal	GREEN	Explanation of Status

Figure 2. Key Win Factors are illustrative and must be tailored for a given organization.

forward, and the customer should have confidence in the bidder. These two outcomes require customer insight, which comes from prior work with the customer, active relationships and face-to-face contact at multiple levels, and an exemplary track record with the customer. A final representative element for grading this factor is the ability to influence the requirements that eventually get into the solicitation. Finally, functional knowledge can partially substitute for true customer insight when the opportunity addresses a functional area that is consistently structured regardless of customer, as, for example, software configuration management.

2. Competitive Assessment. The key questions here are how strong is the competition, and how well do we understand the competition? It is very important to know the strengths, weaknesses, and customer perceptions of each anticipated competitor for the opportunity.
3. Team/Organization. This factor addresses how well the bidder can compete for the opportunity. Is there sufficient capability in each aspect of the anticipated scope of the RFP? Are there sufficient infrastructure and corporate support elements to make a credible bid? Shortfalls to these types of questions can be addressed in one of two ways. First, internal capability shortfalls can be addressed by hiring, infrastructure enhancement, and even targeted acquisitions. The second way shortfalls can be addressed is through teaming. Review of this factor should be preceeded by detailed analysis of these considerations, including preliminary discussions with potential team members to confirm the fit and feasibility of teaming.
4. Baseline Solution. As the opportunity matures, this factor becomes inceasingly important. The bidder should have a good grasp of the proposed solutions along several dimensions. A matured baseline would address:
   - Management Baseline: How our management approach will deliver performance quality, schedule adherence, cost control and avoidance, and risk mitigation.
   - Program Baseline: How we plan to execute the contract to implement our solution, including top-level tasks and head-start activities.
   - Technical Baseline: How we selected our solution, and what specific solution we are proposing including the facts and analytical results that substantiate our performance claims.
   - Pricing Baseline: Definition of pricing strategy, basis of estimates (BOEs), and costing process.
5. Risk/Program Management. This factor addresses uncertainty in the funding profile and budget, unsettled schedule and requirements from the customer perspective, and other risk

factors such as immature underlying technology or geopolitical uncertainty, including the soundness of risk mitigation strategies.

6. Deal. This factor fundamentally addresses whether this opportunity makes sense to pursue financially, with the corresponding consideration as to whether the bidder can offer a competitive price. A substantive price-to-win (PTW) analysis is critical for proper consideration of this factor.

Getting Through the Gates

The types of considerations indicated above provide the basis for defining the criteria for assigning a given color to a given factor at a given gate. The criteria for a given factor definitely should change for each gate. For example, the maturity and specificity of the Baseline Solution obviously will be significantly greater in later gates. Such definitions are important to help drive consistency in grading the factors over time for a given opportunity and

Bid Decisions as Portfolio Management

Dr. Ginger Levin, PMP, PgMP

While every organization has a portfolio, many organizations do not have a defined portfolio management process that is followed consistently across the organization. Portfolio management is a way of guiding investment decisions to assure that actions such as bid decisions on opportunities reflect the organization's truest intent. It applies mainly during the capture phase of an opportunity, and it can help to define the win factors that go into the decision matrix on a bid/no-bid decision. Once a bid is successful, the portfolio management process must rank the result with respect to the rest of the organization's portfolio—other existing projects and other bid opportunities. Resources will then be reallocated or acquired to support this new opportunity and changes in the overall priority of the work being done must be communicated to everyone involved.

While it is relatively easy to set up a portfolio management system, the difficulty is that gaining buy-in and adhering to it represents a major culture change for everyone in the organization. No longer can a single individual make a bid/no-bid decision, for example, without following the system, and others cannot pursue projects only because they believe they will contribute to the organization. Additionally, with the extensive software available for these systems, it is easy for the "tool to become the fool" and to guide the process, rather than the process determining the type of tool to use.

Most portfolio management systems consist of the following:

- Based on the vision, mission, strategic plan, and strategic objectives of the organization, specific categories are established for the organization's various opportunities such as high-risk/high-reward, low-risk/low-reward, etc. or categories based on the organization's areas of business such as information systems, research and development, facilities, existing products, or intellectual capital.
- When there is a new opportunity to consider, classify it according to the categories that have been established.
- Evaluate each new opportunity following a defined and sophisticated process that includes a detailed scoring model that may involve weights for specific categories. Different indices may be required at the opportunity or pursuit level as well as at the organizational level. Constraints must be considered as well as possible risks associated with each opportunity.
- Rank the opportunities based on the scoring model, because there are not enough resources to pursue all possible initiatives.
- Balance the components of the portfolio to make its components have the greatest opportunity to enhance the organization's overall success.
- Communicate to everyone involved the components that have been selected to be in the portfolio, and the reasons others were not selected, e.g., the no-bid decision.

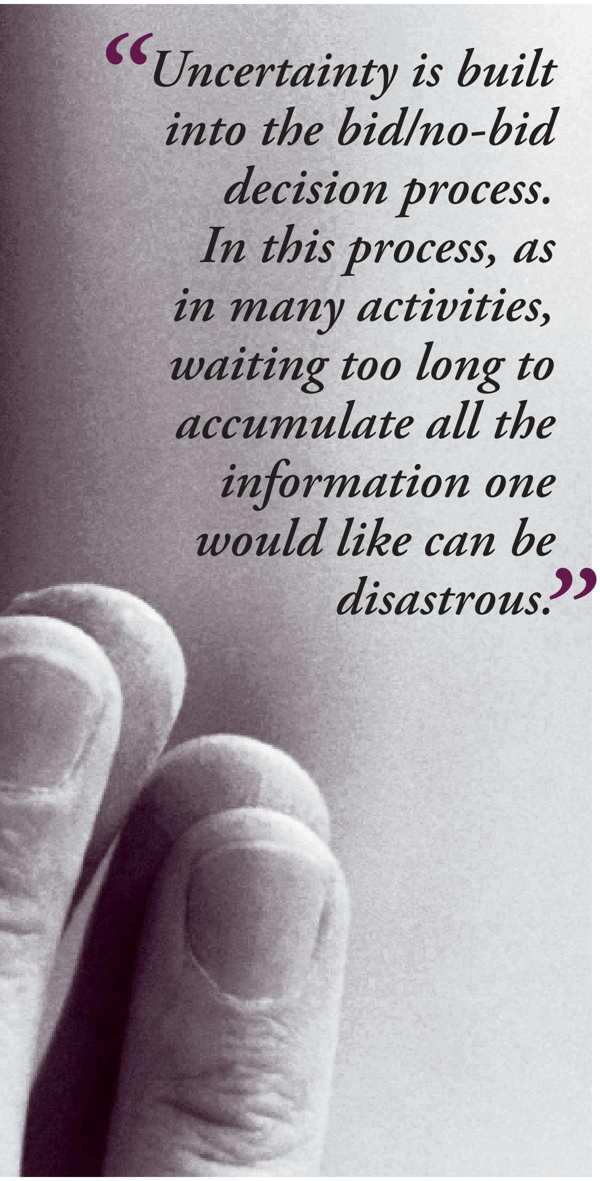
Portfolio management is a dynamic process. In the business development field, an opportunity may be initially selected and a decision may be made early to bid on it. However, as more information is known, this decision may change, forcing a re-balancing of the portfolio.

across all opportunities over the entire organization. Further, defining and documenting the criteria for assigning a color provide a consistent basis for management review. In a given gate review, the management team can confirm that the criteria were effectively considered and justify the mix of color scores presented for an opportunity.

A well-structured process should include, at each decision gate, documentation of other considerations beyond the win factors, including:

- Objectives
- Inputs and information requirements
- Roles and responsibilities
- Customer interaction needs
- Corporate alignment techniques
- Process performance measures/ quality control.

Finally, it is important to get the right timing for completion of each decision gate. The process should arrive at gate 4 after a qualified opportunity has been thoroughly analyzed and a solid capture plan developed. This gate should occur as soon as practicable to maximize the remaining time available to green up the win factors. The ideal timing for gate 5 is soon after the Draft RFP (DRFP) is obtained. The DRFP provides additional basis for analyzing the win factors. Further, given that time has elapsed since the Pursuit Decision, this is an opportune time to assess progress on the various get-to-green plans. Finally, the DRFP provides a basis for estimating the proposal effort, so additional bid questions at this time address whether we have the resources to develop a winning proposal: budget, people, skills (i.e., authors, subject matter experts, coordinator), including confirmation that teammates will appropriately provide resources. Gate 6, confirming the bid decision, should be cleared after the final RFP is received, and the bid decision is confirmed. Are there any changes in final RFP (versus the DFRP) that negatively impact our competitive position? Also, this gate provides an opportunity to assess the greenness of win factors.



No Bid? We Can Still Be Friends

Uncertainty is built into the bid/no-bid decision process. In this process, as in many activities, waiting too long to accumulate all the information one would like can be disastrous. Dorner (1996) emphasizes that it is never possible to know everything, so decisions should be made as soon as there is enough information. The best results come when a decision-maker can find that balance point between acting too fast and becoming paralyzed by waiting for more input.

A good process, naturally, sometimes will result in a decision not to bid. This is not a failure; far from it. But letting the no-bid be the end of the relationship

The Big Question on No-Bids: Were We Right to Let it Go?

Dr. Ginger Levin, PMP, PgMP

A bid/no-bid decision is not a purely quantitative exercise, so measuring whether the decision was right is a challenge. The Business Development Capabilities Maturity Model (BD-CMM) provides a framework for assessing proposal processes, but metrics for the no-bid decision itself are sparse given the difficulty of assessing an action not taken. Nevertheless, it is possible to set up metrics to evaluate the no-bid decision and learn from what these metrics indicate.

APMP and the Business Development Institute International (www.bd-institute.org) introduced the BD-CMM as a framework in 2004 for developing and evaluating proposal processes, including the bid/no-bid process. The model provides benchmarks (from Level 1 for ad hoc approaches through Level 5 for optimized processes) for four Key Process Categories (KPCs): Customer, Focus, People, and Capabilities. An overlay of Key Process Areas (KPAs) defines clusters of related activities that, when performed collectively, are designed to achieve a set of goals. The goals, once achieved, lead to increased maturity. Each KPA has five common features:

- Commitment to Perform–policy and management support
- Ability to Perform–resources, organizational structure, and training
- Activities to Perform–planning, performing, monitoring, and taking preventive and corrective action
- Measurement–status and effectiveness of activities performed
- Verification–reviews and audits.

Assessments using the BD-CMM are recommended to set a baseline for the organization and then to measure progress periodically—say, at six-month intervals. In the interim, a focus on metrics can enable the organization to see progress being made. Some metrics are easily quantifiable, such as proposal win rate. Others are less tangible, such as overall customer satisfaction. Metrics can guide overall improvements, communicate the need for change, improve and develop the organization's competitive position, help to promote buy-in and commitment to needed changes, and set baselines.

So what specific metrics can help us evaluate the bid/no-bid decision? First, the organization must determine how it defines success. It is important to recognize whether the desired results are being achieved, and if not, why. Is customer satisfaction achieved with the work that is being done? Are customers' objectives met and exceeded? Are the projects undertaken for customers contributing to the success and business of the organization? One possible definition is to consider success as making predictions and meeting commitments.

In setting up a metrics system in your organization, one suggestion (Rad and Levin, 2006) is to organize them into three categories:

1. Things metrics, such as win/loss statistics, production costs, capture ratio, win ratio, overtime costs, overruns of bid and proposal (B&P) budgets, status against the plan, and bid/no-bid tracking.
2. People metrics, such as use of knowledge, skills, and competency profiles in determining those people best suited for different roles and responsibilities in business development; participation in a business development career path; participation in mentoring programs; evaluation of individual skills against job descriptions; evaluation of training completed according to the training plan; rate of progress in competency development activities; individual achievements such as increased competencies and certifications; and making the bid/no-bid decision.
3. Enterprise metrics, such as the probability of success of the pursuit, strategic importance, impact of the pursuit on the (con't)

could be. Note that how and when to notify the customer of the no-bid decision are important to establishing, sustaining, and even strengthening the relationship.

Esri, a company that develops geographical information systems, has a response known as the "custom no-bid." This is a letter, no more than five pages, that explains why they are not bidding on the opportunity. Usually, the issue is technical: The customer wants something that their products or services cannot deliver exactly as specified. They explain this and suggest alternatives that would be feasible. The letter is not intended to get the RFP withdrawn and rewritten, although it would be a nice outcome. Nor is it necessarily intended to raise doubts about the realism of any proposals they do receive, although raising legitimate doubts about one's competitors is a legitimate practice. The letter, then, is a tool for giving the customer more information about our products and services; the hope is that the next RFP will take this into account, and give us a target to pursue.

Another benefit of the custom no-bid is its effect on the relationship between Esri's sales operations and proposal operations. A generic no-bid letter does not advance the relationship with the customer. A custom no-bid letter helps the sales staff without consuming significant amounts of time from the proposal staff.

Some organizations consider the question of when to notify the customer of a no-bid decision as part of their strategies. On the one hand, an early notification, especially if accompanied with an explanation, could get the RFP withdrawn or modified sufficiently to enable a bid. On the other hand, if it is definitely a no-go,

organization, benefits of the pursuit to the organization; status and effectiveness of innovations in practices and technologies, continuous improvement; ability of practices to provide value-added benefits to customers; customer satisfaction; efforts associated with evaluating and implementing new technology; the total expected value of the pursuit; the internal rate of return; the net present value of the earnings from the pursuit; the expected commercialization value of the deliverable; the time required to break even; and the impact of the bid/no-bid decision.

As we see, metrics for the bid/no-bid decision fall into all three categories. If it can be easily tracked, it can be considered a things metric. Making the decision serves to classify it as a people metric, and its impact to the organization shows as well that it is an enterprise metric. As a people metric, it shows a clearer picture of the views of those involved in making the decision, recognizing that personal challenges and characteristics of a team environment can affect team performance. The people involved may make this decision for a variety of reasons including:

- The level of their existing work
- The required resources to complete a successful bid and then execute the project
- The concern that an incumbent may have an inside track and cannot be defeated under any foreseeable circumstances
- The recognition that success is due to the people who are involved in the process, so their level of commitment to any bid must be high for the organization's business development initiative to succeed.

business development professionals have known for years the axiom that ***"what gets measured, gets done,"*** *we also must recognize* ***"what gets measured gets better"***

Enterprise metrics are the most strategic and the impact of a bid/no-bid decision fits this category. Not bidding will not have an impact on the portfolio today since no rebalancing will be required, but it may have a major impact later. For example, the organization may lack opportunities to expand into new markets, maintain pace with its competitors, and support existing and ever-changing strategic goals and objectives. A no-bid decision may mean that the organization has elected to remain in its current area where it is viewed positively and not to pursue expansion. Or such a decision may be based on the potential payback—perhaps the amount and timing of the return do not justify the risk.

Although metrics can help an organization understand and evaluate the bid/no-bid decision, they cannot do so in a vacuum. Metrics do not make decisions—people do. And a culture that is supportive of the use of metrics is required for success. Therefore, it is necessary to show the people involved that actions are resulting from the evaluation process. A good approach is to identify the stakeholders for the metrics—those key individuals with an interest in or an influence over the business development opportunity. Analyze each stakeholder and determine whether he or she is supportive. Then, examine each proposed metric and its purpose. These parameters can provide a framework for designing a package of metrics that will have buy-in and produce meaningful results.

It also is important to assess how the metric is to be provided. Is it something that is already collected, easy to collect, or difficult to collect? If it is difficult to collect, determine whether the required effort is worth it in terms of its value to the stakeholders and the organization.

It will be easy to collect statistics on tracking number of bid/no-bid decisions that are made, more difficult to assess why a bid/no-bid decision was made, and even harder to determine the impact of the decision on the organization. While business development professionals have known for years the axiom that "what gets measured, gets done," we also must recognize that "what gets measured gets better" (Rowan, 2005). So consider the use of metrics as a way to foster continuous improvement, not business as usual, as a prerequisite for success.

notification at the last minute can be a good course. If Competitor A learns that Competitor B will sit out a competition, Competitor A can raise its price, walking away with not just a win, but a high-profit win.

The nature of the review process can be another consideration in when to notify the customer. Many of the grant programs that UCR pursues involve a peer-review process. Since reviewers must be knowledgeable but disinterested, a professor who is not competing for funds is ideally situated to help decide who should win the award. UCR once had a case where a professor struggled with the decision over whether to submit a proposal in response to a particular solicitation. After discussing the question with the program officer and others, he finally decided not to go forward. As a courtesy, he notified the program officer who waited about two minutes before inviting him to be a peer reviewer.

Common sense and conflict-of-interest rules would dictate that Competitor B will not be invited to read Competitor A’s proposal. However, Competitor B could offer experts to provide technical review or expert advisory services. If the customer accepts, Competitor B will learn a lot about how the decision process works and what the hot-button issues are. And the customer might feel that it owes Competitor B a favor later on.

When Yes Means No

Even when the clear decision on an opportunity is not to bid, sometimes the correct decision is to go forward. The most common case is when the customer specifically asks a prospective bidder for a proposal. It might be clear to both parties that there is no chance of a win, but sometimes the customer needs at least two qualified bids before it can make an award. If a proposer values the long-term relationship, the correct decision could be to go ahead, even though this just makes it easier for a competitor to walk away with the business. We have heard of some proposers asking for bid bonds in this case—essentially, compensation for the cost of putting together a proposal as a favor.

A more delicate question arises when the customer really wants a bid, and there is a realistic chance of winning, but the proposer does not want the job. In this case, the proposer sometimes inserts a “poison pill” into the proposal. The bid itself is responsive, but it contains something so distasteful to the customer that there is no chance of winning. The potential negatives of this are, of course, significant: The proposer has wasted resources on a full-blown proposal that cannot win; the customer has invested full-blown effort in reviewing the proposal; and the customer might be forced to select a proposal that, for whatever reason, would not have been the obvious first choice.

Finally, sometimes we go forward with bids for reasons other than expecting a win. As noted earlier, UCR routinely pursues opportunities with win rates in the single digits. Partly, this is a cultural thing: A grant program with a 20 percent

win rate is considered to be pretty generous, and smart proposers sometimes can beat the odds. For example, the National Science Foundation (NSF) has a prestigious program for new professors called the CAREER program, and win rates run in the 10 percent range. UCR has initiated a program where they have last year's CAREER winners coach this year's CAREER proposers on what worked and what did not work for them. They maintain a collection of advice in what amounts to a body of knowledge repository. Since starting this in 2004, UCR has never had a year without a single CAREER win; in the 2009-10 cycle, they went 3-for-8.

Admittedly, however, there are some nearly impossible targets out there—for example, the NSF Engineering Research Center (ERC) program, a grueling 18-month cycle that involves a pre-proposal, a full proposal, and a site visit to winnow approximately 180 aspirants down to 7 or 8 awards. Even worse, the money for these awards is not really very much. The prestige of winning is huge, and that is why a relatively new, relatively small engineering college pursues it. Although UCR has yet to win an ERC, they have established themselves as competitors at this level, and have moved onto a first-name basis with the program officers. UCR has not yet had someone invited to review ERC proposals, but that is because they are competitors. UCR expects that the time will come when their multiyear investment in pursuit of an ERC will pay off.

Conclusion

There is no one-size-fits-all format or degree of formality for a bid/no-bid decision. Regardless of the opportunity and the organization, best practices for this decision embody the following elements:

- Qualify opportunities as early in the process as possible.
- Acknowledge that the decision always will involve some degree of uncertainty. Whether the process involves a simple decision matrix with just a few win factors or a detailed array of dozens of gates, use the best information available to color each gate either red, yellow, or green. Identify get-to-green strategies and monitor progress on these strategies so you are ready to make the bid/no-bid decision in time to go forward.
- Use no-bid letters/notifications to advance your relationship with the customer. Walking away from a bid can still represent an opportunity to build the relationship.
- Consider bidding for strategic purposes, even if practical factors for the specific opportunity point to no.

RESOURCES

Books:

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Author Bio

Randy Randazzo directs proposal operations for Phacil, a government contractor with a diverse portfolio of customers and services rendered. He actively participates in the capture process and bid decisions. He delivered a presentation on the topic of Bid Decisions to the Fall 2009 Professional Day hosted by APMP NCA.

Mitch Boretz directs proposal operations for the Bourns College of Engineering at the University of California, Riverside. He scouts opportunities, assists in putting together teams, collaborates closely on proposal writing and production, and handles other aspects of pre-award activities. He has been a member of APMP since 2000, has served on the board of the Southern California chapter since 2003, and was named a Fellow of APMP in 2008.

Nora O'Toole leads a proposal and sales support team at Esri, a company based in Redlands, California that develops geographic information systems (GIS) solutions that function as an integral component in nearly every type of organization. Her team collaborates with sales and services staff to identify and respond to bid opportunities. An APMP member since 2005, she actively supports the Southern California chapter.

Ginger Levin is an independent consultant and educator in project management. She specializes in portfolio management, metrics, program management, maturity assessments, and the PMO. She is an Adjunct Professor in project management for the University of Wisconsin-Platteville and SKEMA, France. She supported the development of the Business Development Capability Maturity Model (BD-CMM) and its appraisal methodology. Ginger received her doctorate from The George Washington University and also received the outstanding dissertation award for her research on large organizations. Ginger is certified as a PMP, PgMP, and OPM3 Assessor and Consultant by the Project Management Institute. She is the co-author of nine books, the sole author of one book, and has spoken at several APMP conferences. She invites your comments at ginlevin@aol.com.

Book Reviews

Why Do We Do Book Reviews

The mission of APMP is to advance the art, science, and technology of business development and to promote the professionalism of those engaged in these pursuits through the sharing of non-proprietary methods, approaches, and processes.

The Journal promotes APMP and its goals through the timely publication of articles, reviews, and references. It is a medium for promoting constructive, intelligent discussion and debate about business development and proposal management. In short, we do book reviews to highlight interesting and innovative ideas, to critique approaches and processes, and to engage in meaningful discussion on matters of import to our profession.

Who Does Them for Us

APMP members and established proposal and business development professionals know each other's tastes and preferences, have a higher level of specific knowledge and experience, and trust each other's opinions more than they would trust an unfamiliar critic or an uncredentialed reviewer. Book reviews for *The Journal* are primarily performed by and are tailored for our membership. Others have performed reviews, in general those with expertise and experience in the topical area of the reviewed book.

What Kind of Books Do We Review

There are a lot of reviews of titles featured at the top of bestseller lists in popular publications like newspapers and magazines. There are no review forums like *The Journal's* in print and online archive of more than 70 reviews of books with content specific to the needs of business developers and proposal managers. We constantly scan for upcoming titles by respected authors, credible researchers, and practitioners in the field. A running list is maintained with 4-6 reviews targeted for inclusion in every issue.

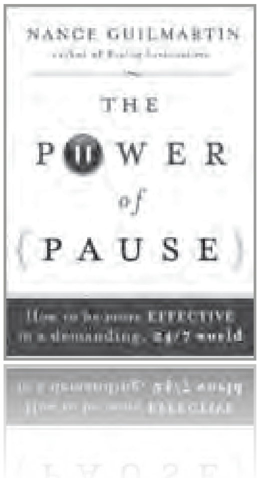
What is On Our Current List of Books to Be Reviewed

The Journal's current roster of books to be reviewed includes a cross-section of recently or soon-to-be released titles relevant to APMP members and includes; *The Past Performance Handbook* by Peter Cole and Joseph Beausoleil released in 2010, *A Guide to Proposal Development and Project Management: The Art of Funding Ideas* by Arnold Shore and John Carfora released in 2010, and *Effective Negotiation: From Research to Results* by Ray Fells released in 2010.

An Interesting Idea

You work on a team engaged in new business development and proposal management. You have worked with this team and refined your approaches and understanding to what works well and are delivering measurable results. While working together you have had the opportunity to learn from each other, critique ideas, and have developed your own refined viewpoints and methods. What if you did a group review of a couple of titles in your area of expertise, or that presented ideas promoting alternative approaches or viewpoints to your teams? I would be interested in hearing your opinions.

Get engaged—sign on for a book review. Books, guidelines, and coaching are provided. Contact Jim Hiles, Books Editor at jim.hiles@morganfranklin.com



The Power of Pause:
How to be More Effective in a Demanding, 24/7 World

Nance Guilmartin

Jossey-Bass, 2010

$16.47

by: **Vic Blanco**

The Power of Pause is the latest addition to the long array of books designed to help us get control of our busy lives and become more effective. Nance Guilmartin, an Emmy-award winning broadcaster, author, speaker, corporate consultant and executive coach, wrote this book because she recognized that we all suffer from communication gaps at work and in our personal lives. She credits the reason for writing this book to her early days as a news writer, when she was constantly up against a deadline, and to later in her career when she served as an aide to Senator Paul Tsongas. As an aide, she observed first hand how the senator passionately listened to people on both sides of an argument and then skillfully brought them together in agreement. This requisite life experience and practical know-how gives Ms. Guilmartin credibility and authority, and persuades us to take note of her book. Which one of us would not benefit from learning to make better use of the limited time we have interfacing with people each day, or communicating more effectively and efficiently?

In today's "hustle and bustle world," almost all of us are in automatic response mode. Ms. Guilmartin reminds us that with the advent of "time-saving" devices like cell phones, PDAs, Blackberries, and laptops, it seems like we are compelled to provide an instant response. This is a prime example of where taking a pause might not be a bad thing. She asks how many times in our haste to reply we send spur-of-the-moment, ill-considered responses. I sometimes find myself guilty of committing such an offense when trying to keep up with the email throughput, and must admit an occasional pause would be welcomed. In her book, Ms. Guilmartin details The Power of Pause technique , which can help us to resist the urge to automatically react and to manage our reactions. This in turn leads to taking control of decisions.

There are several worthwhile principles and techniques provided by Ms. Guilmartin. One of the recurring mantras she uses throughout the book is "Get Curious Not Furious." This approach calls for us to interrupt the rush to react, remove ourselves emotionally from the situation, Get Curious by checking assumptions and facts, regain control of the situation or ourselves, and thus make a more well-thought out decision. While this may seem like common sense, how many of us have the wherewithal to consistently put this technique into practice? Ms. Guilmartin provides numerous stories

> *"In today's "hustle and bustle world," almost all of us are in automatic response mode.*
>
> *Ms. Guilmartin reminds us... taking a pause might not be a bad thing."*

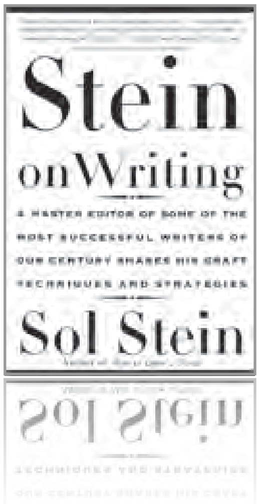
to illustrate this approach. George, for example, immediately flew off the handle when a colleague sent an email to his team that seemed to undermine his authority as their supervisor. But when he put the "Get Curious Not Furious" approach into play, he was able to rationally analyze the situation and make a better choice before reacting in haste and emotion.

Another useful practice that Ms. Guilmartin shares with her readers is to ask "What's on Your Plate?" Nowadays, people don't feel they have a choice or the authority to prioritize, to redistribute, or to take work off their plates. No one wants to appear overburdened or look incapable and complain to their bosses. So the natural tendency is to continue to absorb the increased workload. Here, Ms. Guilmartin tells a story about another client, Ramon Padilla, an information technology resource executive who is faced with the challenges of the "impossible workload" and never-ending number of layoffs across his work force. In the face of all of this turmoil, Ms. Guilmartin was requested to develop a "Work Smarter Together, Not Harder" program to resolve these negative forces and create a positive and efficient work environment. In another example, Ms. Guilmartin recounts her own early experience at the Westinghouse Broadcasting station dealing with a growing list of her supervisor's priorities, and how she eventually developed a quick weekly "plate check" with her supervisor, a simple process that can prove valuable in all of our weekly routines.

I sincerely enjoyed *The Power of Pause*. Although it echoes many of the basic principles we all learn as we mature in our business and personal lives, Ms. Guilmartin successfully captures and clearly articulates these principles to create more efficient and effective communication. Reading the multiple examples of clients that she personally helped and the positive results they achieved through the techniques she taught them adds credence and validity to her book. Although *The Power of Pause* was not written with proposal writing as the main focus, Ms. Guilmartin's techniques can be adapted to the multiple challenges we face when writing proposals. I highly recommend *The Power of Pause* as a refresher course in better communication techniques and a look into some new approaches that can help us control our decision making processes.

"Reading the multiple examples of clients that she personally helped and the positive results they achieved through the techniques she taught them adds credence and validity to her book."

Vic Blanco, CPCM, PMP is the Director of Contracts for SBG Technology Solutions, Inc. (www.sbgts.com), an 8(a), Service Disabled Veteran Owned Small Business (SDVOSB) based in Alexandria, VA. He is a retired 22-year US Navy Supply Corps Officer with an M.S. in Systems in Acquisition and Contract Management from the Naval Postgraduate School in Monterey, CA. He can be reached at vblanco@sbgts.com.



Stein on Writing

Sol Stein

St Martin's Griffin, 1995

$9.35

by: **Catherine Read**

Ready to be a Writer?

Not everyone who writes is a "Writer" any more than everyone who speaks is a "Speaker." We may possess the basic skills to perform the basic functions, but not to earn the distinction of wearing the capitalized title for what we just produced.

In the book *Stein on Writing*, the author offers great how-to advice for reaching beyond the basic skills we were taught in school (and on the job) and to fully use all that we have available to better communicate. That is the purpose of writing: to communicate, convince, entertain, educate, and enthrall. So perhaps your type of writing does not have at its core the need to enthrall, but good writing is a bonus you can provide to your readers.

Sol Stein is himself a novelist (*The Magician*) and also an editor of many great writers including James Baldwin and W.H. Auden. He has been writing his whole life and honing his craft as he moved from one role to another. One of the great benefits of this book is that he moves from one perspective to another quite seamlessly: explaining how to create great prose from the first sentence of a work to deciding on its title, to taking the editors position of how to "cut flabby prose" and more quickly get to the heart of the matter.

The book is aimed primarily at fiction writers, and this is disclosed right up front with the notation that he does provide guidance for those writers of non-fiction. Yet I found the entire book beneficial to my non-fiction writing simply because he is teaching a craft. Those skills might help you build a birdhouse or carve a mantelpiece, but it will be a finely crafted final product regardless of what you set out to build.

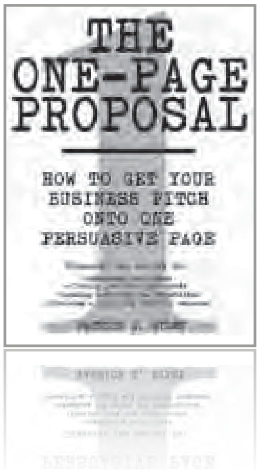
That is central to understanding why the investment in reading this book has a payoff regardless of what you are writing. If you are paid to write as part of your job, then getting better at it is essential to moving forward in developing your own skill set. I find myself re-reading emails to cut them in half, take out the unnecessary "flab" and pondering more deeply a catchy subject line. Too much effort for emails you say? To what degree does that form of written communication make up the body of how we communicate on a daily basis—both personally and professionally?

Think how social media has changed how we communicate in writing. You do not have a paragraph to set up a thought: on Twitter you have 140 characters, a Linked-In invitation is 300 characters, and a Facebook status update 420 characters. Millions of people communicate this way every day. Did Sol Stein have this in mind when he wrote this book? Surely not. Here you carve a miniature masterpiece.

When I give presentations on social media, I recommend books to read that I feel offer insight and skill building information that can help those who want to use communication tools well. Invariably, there are people in the room who "don't have time to read." Is that you too? Almost every major book now published has an audio book version, including *Stein on Writing*. Audio books can be checked out of the library (where available), purchased on CDs, or my personal favorite —downloaded to my iPod. I download books from my local public library as well as purchasing them through sources like Amazon.com. In walking my dog for an hour early every morning, I can easily read a book in a week. It also allows me to listen to it over and over again when I want to go back and strengthen my understanding of the material. So do not let time stand in the way of investing in your own skills.

The challenge in this new economy for all of us is going to be acquiring the skills necessary to meet the demand of industries and jobs that have not even been invented yet. While we may not know what those new careers will look like, it is a pretty safe bet that having excellent written communications skills will be a requirement. If I had to recommend one book that will help you learn better ways to write, it would be this one. *Stein on Writing* is an investment in taking your abilities to the next level.

Catherine Read is a marketing consultant specializing in social media for marketing and business development. She provides seminars, workshops, and keynote presentations, as well as individual and corporate consulting. You can connect with her at www.CreativeRead.com.



The One Page Proposal

Patrick G. Riley

HarperCollins, 2002

$16.95

by: **Johnnie Taylor**

The One-Page Proposal by Patrick G. Riley is based on the premise that a one-page proposal, strategically crafted, can be a means by which one can cut through the clutter and dissonance of data normally associated with proposals and get their proposal read by their intended audience. In the 100-page, 9-chapter manual, Riley immediately defines the one-page proposal, discloses its origin, and defends its value by addressing what it is, what it is not, and why one page.

The heart of the manual is Chapter 3, Preparation. It is in this chapter that the value and academic grounding of his methodology becomes apparent. What seemed to be a simplistic, lightweight manual at first glance, destined to join the graveyard of other how-to manuals, rises in substance and value like a phoenix. In this chapter, Riley anchors the one-page proposal to sound, full-bodied research, subject mastery, and the requirement of being smart enough to know what you do not know and humble enough to fill in the gaps. He taps into the wellspring of true education and beckons the reader to drink what only a sincere and passionate heart, committed to an understanding of the subject can retrieve. It is in painstakingly documenting and confirming what is known and in documenting and researching what is unknown, that the reader lays the foundation for the actual one-page proposal.

The one-page proposal is defined as a project that demands patience if one is to prepare a perfect document explicitly for a particular person. According to Riley, preparation takes time and is the key to proposal success. He emphasizes that time is needed to perform the critical research required to fill in any knowledge gaps about the proposal recipient.

While recognizing that time is a shrinking commodity, Riley clearly sends the message that time spent at the beginning decreases the time the proposal recipient needs to embrace the message of the proposal. Allowing enough time for adequate preparation is so important that Riley admonishes not to set a time-based deadline, but rather a perfection-based goal line, since perfection is the goal.

In chapters 4 through 10, Riley details each step required to build a one-page proposal pointing out the importance of each step and the connectivity that must be evident between each section to have an effective proposal.

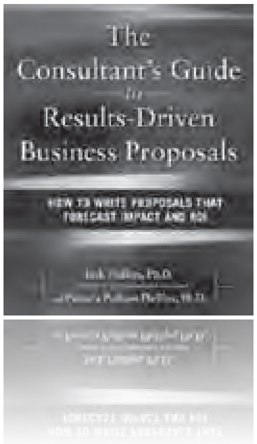
Riley masterfully shows the creative possibilities and broad utility of a one-page proposal. In chapter 8, he presents a one-page proposal based on the Great Pyramid of Cheops. He includes in the manual diverse proposal examples relative to the space shuttle, restoration of a mill, HDTV feature films, production of a feature film, and the one-page proposal use to propose the actual manual.

In *The One-Page Proposal,* Riley organized his ideas, found the right words, and was thorough in his presentation. I recommend this book to all proposal writers that truly desire to improve their proposal writing skills, to those that want to influence their company's bottom line, and especially to those that believe in the value of the dreams that fill their nights and desire a practical means to turn these dreams into the vision that leads their days.

Mr. Taylor has more than 20 years' government and commercial service contracting and acquisition experience. He is currently the Chief Operating Officer and Managing Director, Business Operations at NEANY, Inc., an independently owned SBA-certified 8(a) research, design and engineering company located in Hollywood, MD.

His experience includes serving as the Senior Manager, Contracting Division, for MorganFranklin Corporation, of McLean, VA; serving as a Contracting Specialist and Contracting Officer at the Naval Air Systems Command and Naval Air Warfare Center-Aircraft Division, Patuxent River, MD; and serving as Chief of Logistics, US Air Force.

He has advanced degrees from Boston University and The National Graduate School of Quality Systems Management. He is a member of the National Contracts Management Association, and a Certified Federal Contracts Manager. He has served as a Director in the National Contracts Management Association, Chesapeake District Chapter.



The Consultant's Guide to Results-Driven Business Proposals:
How to Write Proposals That Forecast Impact and ROI

Jack Phiilips, Ph.D. and Patricia Pulliam Phillips, Ph.D.

The McGraw-Hill Companies, 2010

$26.37

by: **Michelle Norman, APM.APMP**

*The Consultant's Guide to Results-Driven Business Proposals: How to Write Proposals That Forecast Impact and RO*I discusses a systematic, structured approach for predicting return on investment (ROI), the financial value a proposed project will deliver, and how to provide stakeholders with success guarantees. Jack Phillips, Ph.D. and Patricia Pulliam Phillips, Ph.D. explain that guarantees are a great way to show the value of what we can do and put some incentives beyond the forecast.

Drs. Jack and Patti Phillips promote a paradigm shift of adding project value (after award and project implementation) into the proposal development process. The authors want us to use ROI as a proposal tool during the proposal development process. Unfortunately, I failed to grasp the book's main theme until chapter 8, Forecasting Application and Impact.

The authors discuss how forecast value can lead to guaranteed success, using ROI as a proposal tool to guarantee ROI and how it is "…being done now by some progressive organizations, providing the ultimate strategic advantage." The authors state several times that forecasted impact and ROI is where we are headed; however, it would be more persuasive if they had incorporated specific real-world examples of where these principles and value evolutions are being applied and working today.

I applaud Drs. Jack and Patricia Phillip for writing a book of this magnitude. This is a textbook style book that is suitable for classrooms. However, for time-constrained proposal professionals, this book is lengthy, text-heavy, and convoluted. This is not a book to Read; this is a book to Study. Nonetheless, I appreciated the book's logical, consistent order, the final thoughts at the end of each chapter, and the Federal Information Agency: Project Proposal case study in chapter 12.

The book consists of the following brief chapter summaries:

- Chapter 1 discusses the concept of value added and the forecast of ROI.
- Chapters 2-6 focus on the proposal process, project objectives, developing, and managing the written proposal.
- Chapters 7-10 are devoted to forecasting processes needed to predict project value, ROI, and success guarantees.
- Chapter 11 describes what is necessary to guarantee project success.
- Chapter 12 presents a case study that demonstrates the power of project forecasting with guaranteeing results.

The authors promote themselves as ROI experts, self-proclaiming that they "are the leading experts on the use of return on investment (ROI) in non-traditional applications" (see www.roiinstitute.net). Experienced proposal professionals, in their journey to becoming seasoned professionals of their craft, are likely to have witnessed experts from other callings interjecting or projecting their ideas onto proposal development to extend the use and applicability of their core concepts. While this form of intent has merit to introduce new thoughts into how

> *"The authors state several times that forecasted impact and ROI is where we are headed; however, it would be more persuasive if they had incorporated specific real-world examples..."*

proposals are created, managed and presented, frequently the result is that the author exposes a level of ignorance of the current state of the informed proposer (their chosen audience) and their overlay attempts are undermined by the mismatch between the level of understanding of the "great idea" and that of proposals and proposal methods.

As proposal professionals, we expect and appreciate brevity in communication and persuasive graphics that increase the understanding of complex topics. Out of 309 pages, this book has only 16 graphics, all of which are rudimentary, at best. The authors' use of basic lines, circles, and arrows graphics (many taken from earlier books) were ineffective. Some graphics served little purpose and others were beyond my comprehension. The graphics did not persuade or increase my understanding of the processes and techniques. I found myself spending too much time trying to understand the graphics and thinking of ways to make them better.

In addition, the book presents countless techniques, examples, measures, and processes using bullets and lists formats. The bulleted items were overwhelming, and many times these lists were box-outlined and the authors called them tables.

In addition to the complex, text-heavy content, the authors' lack of attention to document design and visual presentation distracted me from the book's message and made reading this book challenging. It would make the book easier to read if the authors incorporate the basic concepts of page/document design throughout the book.

To learn how to include forecasted project value and guarantee success into proposals, experienced proposal professionals may benefit from reading chapters 1 and 7-12. In this section, the authors lay out the underpinnings of their great idea, namely how to guarantee success, the ultimate accountability for projects, in a realistic manner including conditions to be met for the success to be honored. The underpinnings of the success guarantee stem from forecasting from a selection of eight types of data that includes: 1. Reaction to the project, 2. The learning that is necessary for project success, 3. Application and implementation needed for project success, 4. Business impact that will be driven by the project, 5. Monetary value that will be delivered, 6. Cost of the project, 7. Financial ROI, and 8. Intangibles connected to the project.

"This is not a book to Read; this is a book to Study."

Michelle Norman, APM.APMP is an independent proposal consultant and serves as Chapter Vice Chair of the Georgia Chattahoochee Chapter of the APMP. She can be reached at michellenorman@bellsouth.net.

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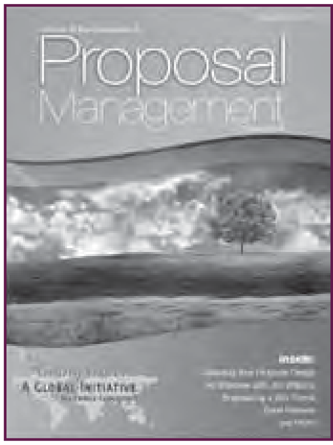

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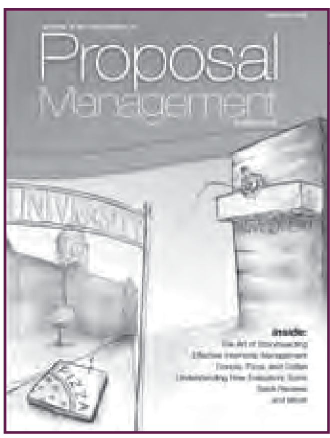

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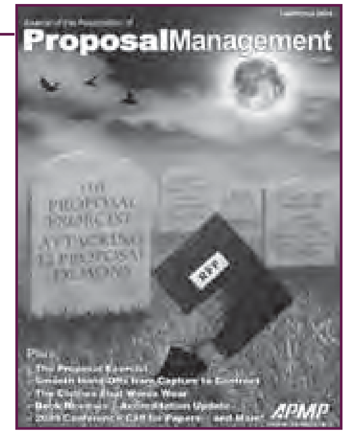

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