Welcome

Ali Paskun, AF.APMP

In our profession, everything is deadline driven. Depending on the size of the bid, we can sometimes develop schedules that would make Mr. Gantt blush. We can even differentiate our deadlines into categories: milestones for major activities such as review teams or submission dates and due dates for supporting activities such as author submissions. It made me wonder recently: how many of us adopt the same level of planning when setting goals or deadlines regarding our professional development? For that matter, how many of us plan at all? Hopefully this issue of the *Journal* will help you think about not only what you want to accomplish in your career, but also help you plan to get there.

Two APMP members describe their respective journeys toward achieving accreditation. First, Rick Harris, AM.APMP, our Executive Director, offers his "Ten Tips to a Successful Foundation Level Exam." He shares his experience preparing for, and taking, the exam and offers advice to help others planning to do the same. Second, Marilyn Moldovan, PPF.APMP describes "how someone who did not believe in the Accreditation Process went the distance and became a believer and a proponent along the way." She discusses achieving all three levels of accreditation and how it motivated her to become more active in her local chapter.

Chris Rademeyer, PPM.APMP is the first APMP-accredited member, and he was instrumental in starting the local chapter, in South Africa. He presented at the 19th Annual APMP conference in California in 2008 and the first APMP conference in South Africa in 2010. Sandy Pullinger, AM.APMP interviewed Chris to learn more about his proposal career, his involvement to advance APMP in South Africa, and his goals for the future.

Have you ever considered what it takes for entrepreneurs to expand a small business internationally? Colleen Jolly, PPF.APMP had an idea to take the 24 Hour Company beyond the shores of America despite having "no international business experience,…no budget, no team to assist, and no legal advice." Her case study describes how a willingness to take on the challenge led her to "…building relationships outside of the United States (US), opening a United Kingdom (UK)-based office, and continuing to expand into other English-speaking countries such as Australia."

In "To Be or Not To Be," Amanda Snee, APM.APMP applies her British sense of humor to proposals, specifically our habit of reverting to a rather stoic language style. She asks, "Do we really need to be talking like we have just swallowed an oxford dictionary along with the whole works of Shakespeare just to compound our perceived intelligence?" Amanda's wit is just what we need for those moments when we want to stop taking ourselves too seriously.

What goals are you motivated to set, and how can APMP help? There are many opportunities available. You could achieve APMP accreditation. Become involved in your local chapter or even start a new chapter. Write an article or review a book for our publications. Present at the Bid & Proposal Con at the Sheraton Dallas Hotel; Dallas, TX on 22 - 25 May 2012 (http://www.apmp.org/?page=ConferenceHome). Presentation Abstracts are due by 14 November 2011; add that to your list of deadlines!

On a personal note: Betsy Blakney, PPF.APMP resigned as Assistant Editor for the *Journal* to focus on her many responsibilities as our CEO, and Kristin Dufrene, AF.APMP joined us beginning with this issue to support our editing cycle. All of us on the *Journal* staff thank Betsy for her dedication and contributions; we welcome Kristin and look forward to working with her.

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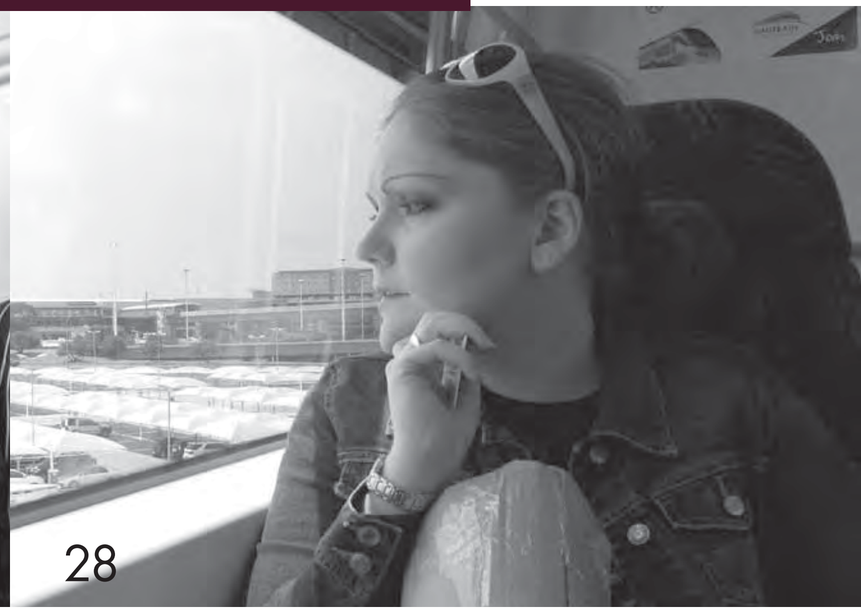

Layout Design by Lakin Jones, 24 Hour Company. Cover Art by Farruk Tillaev, 24 Hour Company.
Denver conference photos courtesy of CACI Inc - Federal

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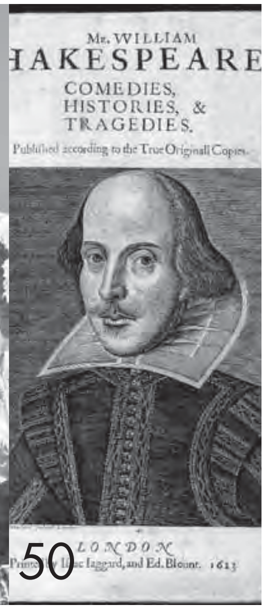

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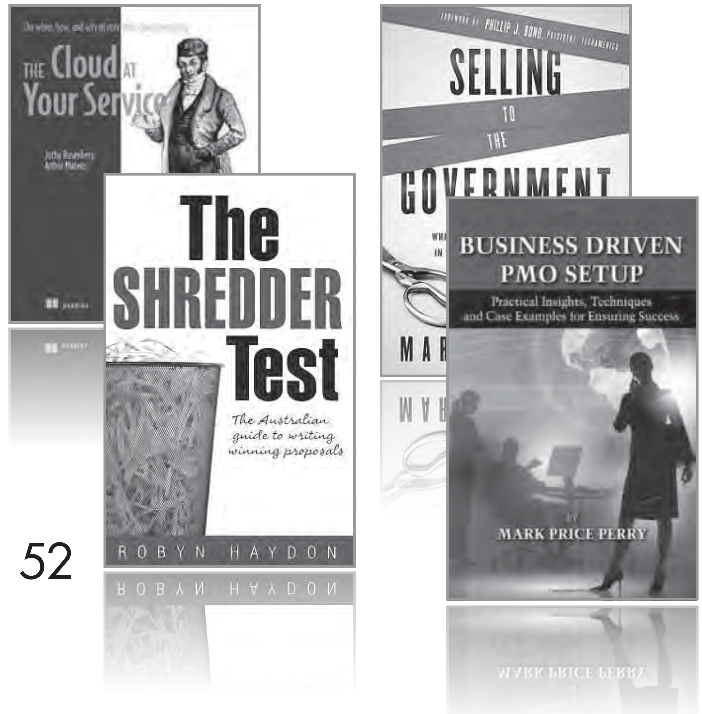

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General Information

Executive Director Forum: **Ten Tips To A Successful Foundation Level Exam**

Rick Harris, AM.APMP
Executive Director, APMP

When I was hired as the Executive Director of the Association of Proposal Management Professionals (APMP®) in February 2011, I made a commitment to the Search Committee to take the Foundation Level Accreditation exam before APMP's Annual Conference in late May. I will give away the ending—I passed, but made it more difficult on myself than it needed to be.

This article is going to help anyone who wants to be Foundation accredited prepare for the exam. I am sharing ten tips with you on how I think you can be successful in passing APMP's Foundation Level exam. This is not a bullet-proof plan for success, but these 10 tips will help you. We are going to start at the beginning of the process and work our way through to the final test day.

Tip 1: Enroll in a Prep Course Before the APMP Foundation Exam.

I could have taken the Foundation Level exam online, but I am glad I took the preparation course and highly recommend it. APMP has Approved Training Organizations (ATOs) that offer APMP Foundation™ Level prep courses followed by the actual exam. These prep courses are held worldwide. The trainers are seasoned industry professionals who care about one thing—making sure that you know and can correctly identify the best practices in the proposal, business development, and capture industry.

Most of the prep courses are about five hours long and cost about $300. The cost of the APMP Foundation™ Level exam is $400 dollars (for a total of about $700) and with that you get the study materials, four hours of instruction, lunch, and then the exam itself.

Tip 2: Determine Who Pays.

Some people pay for the training and the exam themselves because they believe that APMP accreditation is a personal goal and should be funded independent of the company. Others take advantage of an employee benefit where their companies pick up the tab. These companies put a premium on APMP accredited staff. Whichever route you choose (or is chosen for you), work it out early because these training programs fill up fast. When you go online to sign up, have a credit card ready, whether it is yours or your corporate card. Monitor the Calendar Section of the APMP website at www.apmp.org to see when the Foundation Level training programs are being offered, and sign up as soon as you can.

Tip 3: Seek Advice on What to Expect.

There is a fantastic online community on the APMP website called appropriately enough, Accreditation Communities: APMP-Foundation™ Level. To get there, go to www.amp.org, sign on as a member, hit the "communities" link, and then click the APMP-Foundation™ Level from the drop down menu. When you get there, you can see the latest training schedule, and post questions to people who have been through the Foundation level training and exam experience. Other resources include:

- APMP's Accreditation Headquarters (A:HQ). That is where you will find Charlie Divine, APMP's Accreditation Director who will advise you every step of the way. Charlie's job is to help you through every level of APMP accreditation. It does not matter if your question is small or encompassing, Charlie is there to help. You can reach him through A:HQ at

A:HQ
APMP® Accreditation
Works for You

APMP Members attending a Practitioner Level workshop at the Denver 2011 Conference.

charlie.divine@apmp.org or 314-223-3822 or +1 314-223-3822 (GMT – 6 hrs.) for international inquiries.

- Find someone in your company or APMP chapter who has passed the Foundation Level Accreditation exam. Everyone likes to talk about it and after you take it, you will know why. There is a sense of accomplishment and community that makes you want to share.

Tip 4: Study.

It is a good idea to repeat this word. Study, study, study, and study. I say it not to scare you, but studying is key. I feel like if I had put in about 10 hours of study with the *Shipley Proposal Guide* (a great resource), it would have made the experience that much better. Instead, I only studied for about four-and a half hours. It was not enough. I fell into the trap of believing that I could master this because I have been writing proposals commercially for about 10 years. The exam measures how much you know about proposal industry best practices. It does not measure how many years you have been working on proposals. The exam does not know if you are the Executive Director of APMP or a Senior Level VP or a Director of Bids and Proposals or brand new to the industry. So, put in some study time.

Tip 5: An Open Book Exam Does Not Translate to an "Easy A."

APMP's Foundation Level Exam is a multiple choice, open book exam. You can use any printed or electronic resources available to you. Do not let the phrase "open book" lull you into the notion that the exam is easy. It is not. You need to be familiar with your study resources and know where to find the answers in them. This is why study is so important. Knowing the layout out of the resource material combined with your personal experience is the key. The exam is challenging because you have one hour to complete it. You must get 42 answers correct out of 75 questions. That means you need to move through the test at a better than one answer per minute. At the 30 minute mark I only had 20 of the multiple choice questions completed. I spent too much time flipping back and forth between the book and the glossary to confirm answers. I was then on the hot seat and knew I had to pick it up. Leaving a question blank counts as a wrong answer, and at the rate I was going I needed those questions answered.

Tip 6: Listen to Your Instructor.

In addition to giving a great primer on what to prepare for, the instructor was quite clear with the entire class to "make one pass through all the test questions and answer what you absolutely know." The instructor said "if you don't do this, you'll get bogged down and fall behind on the test." (see Tip 5.) I was a confident test-

(from left): Former APMP CEO Tony Birch, APMP Chief Examiner Cathy Day and Accreditation Director Charlie Divine outside the Practitioner Level Workshop in Denver 2011.

taker in school (more than 30 years ago) and thought I knew my testing skills better than an instructor I had just met. He knew the exam. Listen to the instructor, or you will fall behind.

Tip 7: Take Advantage of Any and All Study Time.

There was a little more than one hour between lunch and the exam. I used it to study and was glad I did. I can attribute six correct answers to that study time. I took the exam on the same day as a friend. We both agreed the hour would be better spent studying instead of talking about what we usually talk about—sports.

Tip 8: Do Not Be Overconfident.

I am 51. I have a college degree. I have been in the workforce for quite a while. I make decisions every day that lead to success in business. I am a confident person in most everything I do. So what? As stated before, the exam does not know I am 51, does not care that I have a college degree or what business decisions I made that day. Again, the APMP-Foundation™ Level Exam measures what you know about your industry's best practices. Do not go into this exam thinking that "you have been there and done that" and it will be good enough to get you through. It is an important test and should be treated like one.

Tip 9: Stick Around.

When the exam is over, the instructor and the ATO grades the exam and tells you if you have passed or not. The instructor will call you back into the testing room one-by-one (while your fellow exam takers wait in the hallway) to give you the news. Some people in my testing class left as soon as they heard their result, and I think they missed a lot of the experience. There were about 20 people in my exam class who stayed and waited for every single person to get their result. It felt good to get that kind recognition from folks in the industry. I felt a sense of accomplishment and shared it with the people who took the exam with me. Now when I am out at an event, I will often see people who were in that class with me, and we always talk about "that day." As long as I am at APMP, I will have at least one thing in common with my classmates. We passed the Foundation Level Exam on that day.

Tip 10: Promote It.

I felt so good about the achievement that the first thing I did when I got back to the office was change my email signature to read Rick Harris AM.APMP. That means I am an accredited member of APMP, and I am proud of it. The next thing I did was let the Search Committee know. I knew they were going to be happy for me, and they were. When my business cards are reprinted soon, I am going to put the AM.APMP designation on them. After you pass your exam, tell your boss, get an announcement in the company newsletter, and ask for APMP to write a press release for you to send to your local paper. Most of all, own it because it means something.

Finally, at APMP's Annual Conference in Denver, CO a new class of 42 Foundation Level Accredited members were asked to stand at the opening night Keynote. They had taken the prep class and the exam earlier in the day. Everyone applauded them. I clapped a little harder because I had done what they did one month earlier.

I have told anyone who will listen (now including you) that I intend to complete my Practitioner Level Accreditation by the next APMP Annual Conference. The first place I am going to turn for advice and help is through APMP's A:HQ and Charlie Divine at charlie.divine@apmp.org or 314-223-3822 or +1 314-223-3822 (GMT – 6 hrs.). He is the guy with the answers and the APMP Accreditation game plan. I will be sure to let you know how it goes.

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APMP Mission and Code of Ethics

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.

APMP Board of Directors

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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.

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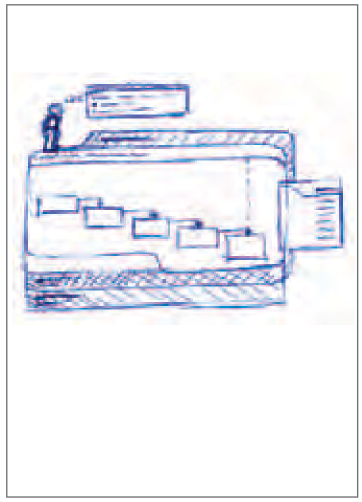

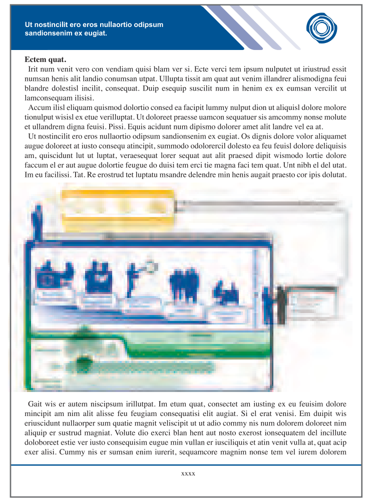

from text or idea → through concept → to completion

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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

Subscription to *The Journal* for APMP members is included in the annual membership dues. For non-members, a subscription is $40 per year. Individual issues may be purchased for $20 each from the APMP office while supplies last.

Advertising Rates and Guidelines

The following rates are effective through June 30, 2012:
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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For technical assistance, please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

Please visit the APMP website at www.apmp.org for additional information, including viewable PDF files of advertisements and articles.

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.

For more information or to plan your contribution, call or email us:

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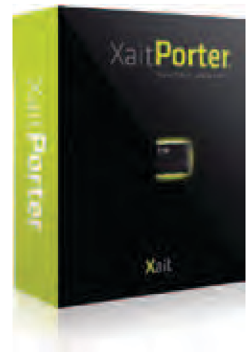

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The *Journal of the Association of Proposal Management Professionals (The Journal)* publishes articles, research efforts, and case studies about business development and proposal management. It provides examples of practical application of industry-accepted 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

 The Journal is printed in the USA. Claims for missing copies must be made within three months of publication date. Missing copies will be supplied as reserve stock permits. Please visit the APMP website at www.apmp.org for additional information about *The Journal*, including viewable PDF files of advertisements and articles.

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.

Conflict of Interest

While staff and contributors to *The Journal* may benefit from the professional recognition they gain through this affiliation, they shall not use *The Journal* as a forum to give inappropriate or unfair advantage to themselves or others. Staff members and contributors are permitted to purchase advertising at standard, published rates. Any staff members or contributors who believe they have a potential conflict of interest must immediately notify the Managing Editor of *The Journal*, who will decide whether a potential or real conflict of interest exists. Based on the Managing Editor’s decision, staff or contributors may be asked not to involve themselves on the subject of the conflict of interest.

Objectivity

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

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Time for a Treat

by: Sandy Pullinger, APM.APMP

A central player on the proposal stage in South Africa, Chris Rademeyer inspires what is still a new profession in the country. Sandy Pullinger catches up with Chris to learn about his journey towards becoming South Africa's first APMP accredited proposal professional.

Chris Rademeyer, PPM.APMP

(Head of Tender Office Southern Africa), Deloitte

Chris Rademeyer is the first APMP-accredited member in South Africa (Professional Level). He presented at the 19th Annual APMP conference in California in 2008 as well as the first APMP conference in South Africa in 2010. He is currently the Head of the Tender Office for Deloitte Southern Africa. Chris has a Masters degree in Communications. He started his career in the South African Defence Force and later became the spokesperson for the Defence Secretariat. For some years he worked in the advertising and food industry. Then he managed the first proposal center in Telkom, a South African telecommunications company. Chris also worked in the IT and outsourcing industry before joining Deloitte.

Fun Facts

To get to know the man behind the proposals, we asked Chris a few personal questions. He lives in Pretoria, the seat of South Africa's government, where the purple jacaranda trees blossom in Spring. Chris grew up in a small farm town. He went to a small school where children came to school without shoes. Children had a lot of freedom and independence. Chris developed a lot of his confidence there, and learnt to deal with people at a very young age. Chris has no pets, claiming it is hard enough for him to look after himself!

Apart from enjoying the occasional whiskey, Chris loves cooking and having friends over. He is part of a dinner club—where a group of friends take turns once a month to have everyone over for dinner and exchange gifts. In fact, he actually wanted to be a chef but finished school at 17, and there was not a training facility that would accept him at that age. Chris would love to open a bistro in a small town one day when he retires.

Other hobbies include growing vegetables and herbs in his garden; going to the theatre for drama, ballet, opera and pantomimes; watching any movies except horror and slapstick; and painting abstract and graphic art with acrylics and using pastels. He actually paid his way through university by selling his paintings.

Chris loves art festivals—a lot of his friends are artists, singers, and actors. He wanted to study drama when he finished his first degree but, growing up in a typically strict Afrikaans home, his father would not allow it. He did eventually do a certificate in drama for fun.

Chris also enjoys reading many types of books including history and autobiographies. He is a big fan of Kellerman books about a detective pathologist, and he loves the Spud series, having read all three.

Education

In what way has the professional accreditation made a difference to you?

It was more of a personal thing for me. Professionally it took a bit of convincing because it was unknown but soon people realized that this is an international accreditation with a particular worldwide standard that we can achieve and Deloitte want to achieve only the best. Image-wise it's a good thing because it places you at a certain level in your profession. I have more credibility; I can speak and make decisions with authority. Because I've achieved accreditation, I have full confidence in my own ability to deliver quality work. My bosses and peers recognize that and are comfortable that my decisions are based on best practice; the best way of doing it.

What are your goals as Africa's first APMP Professional?

For me it's about the profession. We've worked too hard not to be seen as professionals. I will try and help, train, guide as much as I can to make other professionals and companies understand that this is a highly skilled and fun profession.

Chris, you have a master's degree in Communication, and you're busy doing your doctorate. Tell us about your thesis.

It's more difficult than I thought [laughing]. I've done my research, which took about 18 months. I wanted to look at the communication value of tenders in South Africa. What is it that actually convinces the procurement specialists in government departments to purchase? Is it something in the proposal/tender itself; are there non-verbal elements or what is it? Sadly there are a lot of black and white rules in procurement. It's more about compliance rather than the communication elements. So I'm reviewing my choice of subject matter now. (And the idée of a doctorate.) I'm considering doing a comparison between African-centric proposals and European or American ones – or even between the different areas within Southern Africa. Basically I want to explore if the written word and visuals alone has the power to convince someone to place a large order – or what the one thing is that will persuade. Maybe I will have just enough info to write an article!

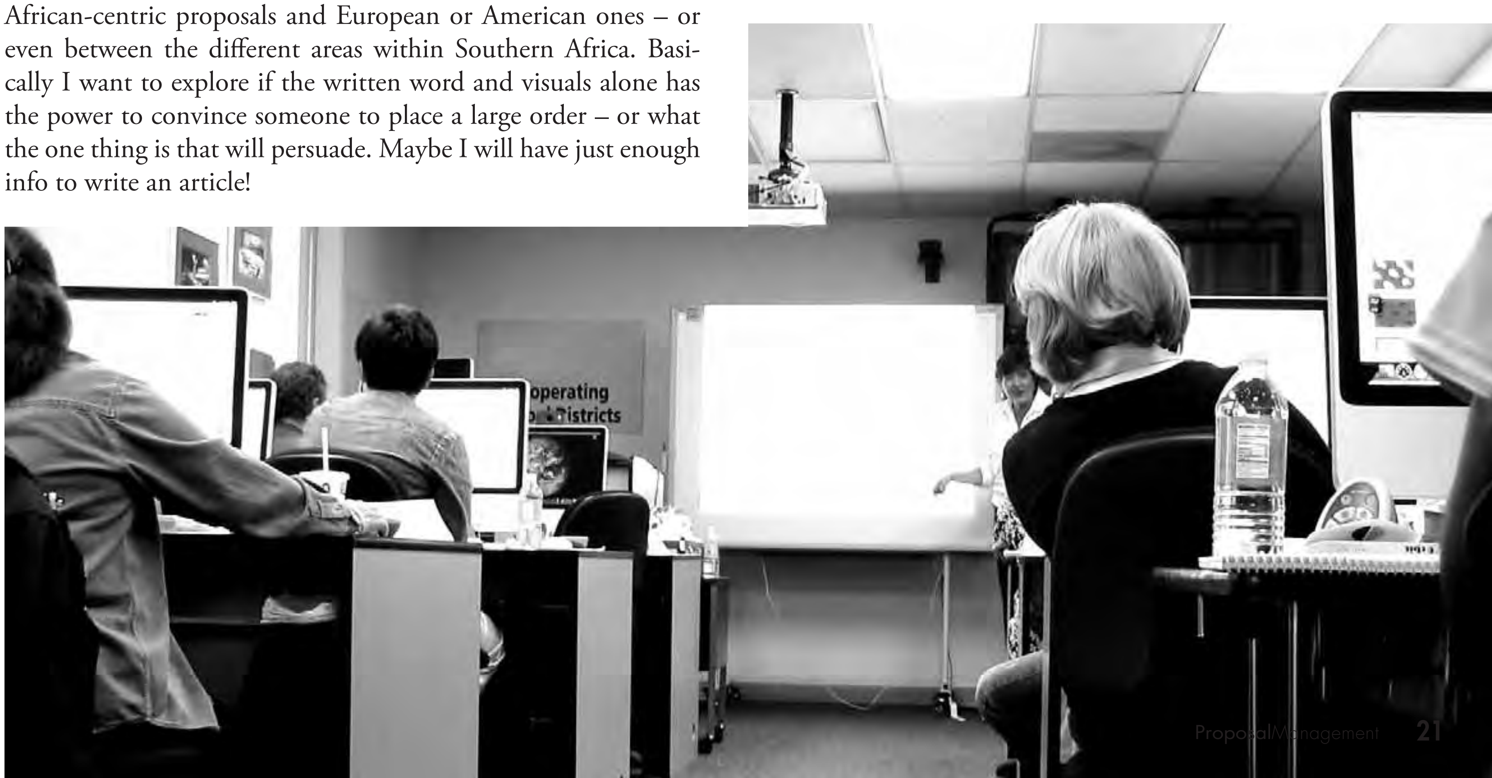
Career

Who are the people that have inspired you in your career?

There were so many. In my university days I had a great mentor—Professor Nina Overton de Klerk. She was head of communications department at that stage. She is an amazing woman. I learnt a lot from her, and I fell in love with the art of communication and negotiation. Coming from a very small town and farming community forced you to accept everything your teacher said and accept there was only one way to do things. But Nina understood me, and realized that I do things a little bit differently. She definitely pushed that and encouraged us. She said that if we answered questions in our exams exactly as she'd taught us then we would get no marks. She encouraged us to challenge her with our answers because nothing is one sided.

In the SADF, Brigadier Johann Beyers was a huge inspiration and had a huge impact on my life as well. Although I was in the defence force, I am a creative person. He helped me channel energy in the right way and allowed me to express myself in a way that wasn't the norm in that environment. The biggest foundation for a lot of my work skills today comes from my time in the South African Defence Force. I learnt principles of discipline, working with processes, following things through, finishing what you start. The SADF was one of the greatest learning schools in my life, and I use the principles I learnt on a day-to-day basis.

Then in my first big job—which was in advertising—Alistair Wilson was a great inspiration. In every job I've had, I have ended up with someone I really looked up to and every time I left a job it was because that person left as well. I'm very blessed that even today with my current director, Pete McCloy, my mentors have realized that I think differently and I do things differently and they have encouraged and allowed that. This is how I learn the most and grow the most because people allow me to do things in a different way.



I came back and implemented this proposal center for Telkom. It was the first commercial proposal center in Telkom. So thanks to the Americans, I received my training in the US and also became aware of the APMP through them. That is where I've met another great mentor, Charlie Divine.

Hillbrow (Telkom) Tower
Johannesburg, South Africa

What did you do in the advertising industry?

I worked for a well known food brand—I was on the print side and in-store advertising. I headed up a department—we served about 500 stores countrywide to do their in-store branding and advertising. It was largely deadline driven, and I learnt how to deal with stress and deadlines, to pay attention to detail and how important good processes are. Delivering proposals on time is a breeze for me [laughing].

What did your role as spokesperson at the Defence Secretariat entail?

The Defence Force was changing to the National Defence Force. The management and finance functions were later taken out of the "government" side to a "private" sector structure run by "civilians." I was the communication officer and handled media, communications between defence committees and secretariat, all PR function and relations between the government and private sector. I sat on all the defence committees and liaised back to the Secretariat and government and I've worked closely with the minister of Defence.

Telkom was the national telecoms provider in a regulated environment. What was it like to write proposals for a monopoly?

When I joined, an American Telecoms company had just bought into Telkom. The execs wanted to have more of an American flavor to things so they looked at the way proposals were being done and I got the job to start a proposal center. Nobody really knew what it was all about but my boss, Randall Seidell, realized that although Telkom was a monopoly, there was going to be more competition for certain business models and it was going to become more difficult to win business. I was sent to

America for training. I came back and implemented this proposal center for Telkom. It was the first commercial proposal center in Telkom. So thanks to the Americans, I received my training in the US and also became aware of the APMP through them. That is where I've met another great mentor, Charlie Divine.

How do IT and outsourcing proposals differ from audit proposals?

It doesn't really matter what type of solution you put forward and to what type client—as long as you follow a good process and basic principles, it doesn't matter how you color it in. Technically these industries are totally different so I can't write the solution but I can give feedback and advice on the end result. I've got a principle that things must work in a process—it doesn't matter what background a proposal manager has, as long as you follow the right recipe then you will get the desired result. I don't look at the technical aspects, I look at how the solution will be able to fix the problem for the client and how convincing is the message in the proposal. Keep asking the technical people if their offering is going to solve the client's problem until he/she says "yes." In a proposal team, you don't only need people with technical knowledge—you also need people with good communication skills that will take the technical knowledge and communicate it to the customer. You also need a good process to make it happen.

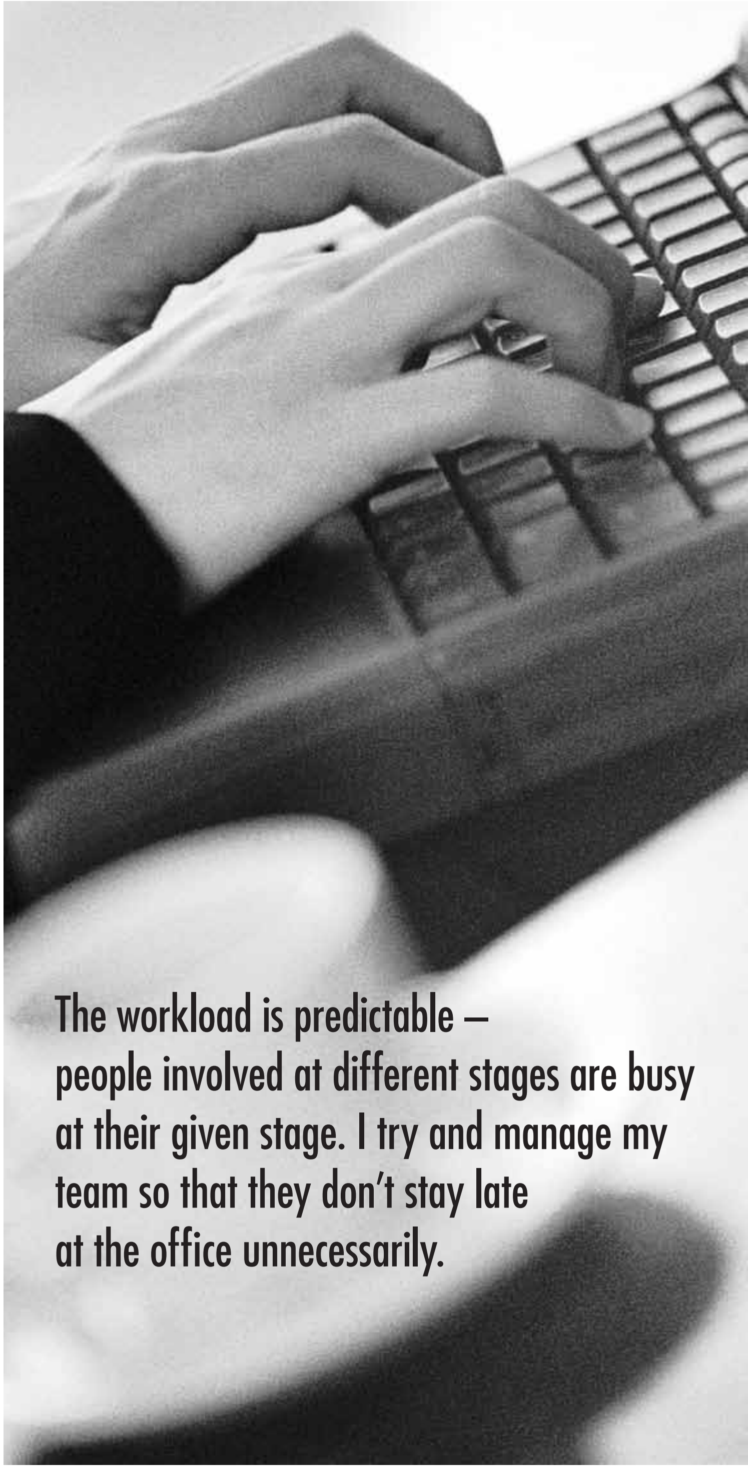
Please tell us about the changes that you've made at the bid office in Deloitte since you joined.

When I started they had a group of people to get tenders out. I followed the same principles that I had in my previous positions. I came in and set up a process and figured out how everyone fitted into this process and ensured there was no unnecessary duplication. I firmly believe there should be duplication to a certain extent so that if one element of the system drops out then the wheels should still be able to turn. We also follow a very strict ISO formula so that one of us can do another person's job and we make sure we keep up to the same level as the other person. This way we can ensure continuity, and there's always a backup should one person be taken out of the system. Luckily I was working with people who already had the knowledge and experience—I just came in and refined the process for the output. (I'm very output driven.) And I have an amazing team. Without a good team no changes will add any value. They are just the best. I'm very blessed.

Avoiding Bid Team Burnout

Most bid teams work under intense pressure delivering to deadlines by spending late nights and weekends in the office. I was amazed by your approach to scheduling your bids to allow quality of life for your team. What's your secret?

Sometimes things can go wrong. If you have a good process, then you can deal with 'surprises' and there won't be chaos. My team and I had a look at our schedules for interest's sake and found that the volume of work we do now is considered quiet where that volume a few years ago was considered extremely busy. We've got so used to the volume, and because it works we don't feel the pinch. The workload is predictable – people involved at different stages are busy at their given stage. I try and manage my team so that they don't stay late at the office unnecessarily. We have a policy of flexi-time in Deloitte and I have individual discussions with my staff and arrangements for their circumstances. I can stagger work hours and I'm flexible. It's about give and take, and I find that when people need to pull their weight, they do it willingly. My bosses Pete and Elena have the attitude that they don't care how I get things done, it must just get done. We schedule people's time a week in advance and stick to it (where possible) so that we can plan according to the workload.



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I remember a story you once told me about a sales person who had a bid on his desk for 2 weeks and then brought it to you at the last minute and you said "No" at the risk of losing the deal and your job, even in the face of pressure from execs. Did this approach change the behavior of the sales team?

Initially they got angry but I set a precedent and now they fit in. It's very important for the whole organization to work together.

Another story I enjoyed was the one where someone had missed your deadline and as a result your team had to stay late, so you made the guilty party stay late too - to bring you coffee and pizza. Won't you tell us the story and the effect that this has had on stress levels?

It's a golden rule for us. Ultimately we can't take responsibility for the final result, the bid manager and executives need to do the final sign off. If someone misses our deadlines then it impacts on the team's schedule and we insist that the guilty person pitches in to ensure the process can carry on.

Belonging to the APMP

You are a trailblazer for us in SA, what are your goals going forward?

In my everyday life and job, my aim is to try and make people aware that this is a real profession and there is a lot of thinking and knowledge that is applied. I'm still on the same quest over all these years since I went to the APMP conference many years back in San Diego on my first ever trip to the USA. I'd just started working for Telkom and I received sponsorship from the US to attend the conference. Proposal writing/development was very new then in South Africa. No one knew exactly what it was and how it fitted in…. was it a marketing/sales/personal assistant function? In fact today I have found that it can still be an issue. I'd like people to take us seriously and realize it is a profession and not just a job. I know the changes it can bring and the impact we really have. We're not the last in food chain, we can make key decisions about how things look and they should be.

You were one of the first members of the APMP in South Africa. Why did you join?

It started when I went to America. I became a member and enjoyed the feeling of 'belonging' somewhere and was very interested in how other people were doing things. I thought to myself at the time that we in South Africa aren't different to anyone else in this industry.

Why were you interested in starting the local chapter of APMP?

It was a gradual journey: coming from America back to South Africa, meeting you Sandy, realizing that there are other people following the same principles, knowing about associations. Initially, people confused us with project management associations—they couldn't see the difference. I knew a few people who actually worked on and developed proposals, and it fascinated me that they couldn't understand the concept. The initial aim for you and me was more to educate people about this association and the profession and to encourage people to stand up and be recognized and join us in our mission. We ear-marked people we knew and clarified what the proposal profession and the industry is about.

What were the challenges?

My biggest frustration initially was getting members, finding these people who write proposals and getting them to come out and say they do proposals. It seemed that people were shy or embarrassed about what they did and felt that they worked in the "steam room." Also, I found that people were very nervous about sharing the way they do things and giving away their way of winning business. They felt almost like they were giving their secrets away. Now they're starting to realize that it isn't a unique situation but rather a process or best practice that is common to the industry internationally and they can benchmark themselves against it. It is possible to share formulae, principles and methodologies without sharing secrets. It excited me that after my presentation at the SA APMP conference, I chatted to a lady from KPMG (one of our competitors) and we shared methodologies and frustrations without sharing any secrets. And that is really what the association is all about.

What have been the rewards?

I truly believe the SA way of doing things has a different angle and I'm so excited that issues such as the BEE scorecard in tenders/proposals, which used to be such an unknown, is now a given and that the SA chapter of the APMP is helping the market mature and understand these things. Three years ago, no one knew what proposal management was all about and they were asking the same questions. Now it's become a norm.

Where do you see it going from here?

APMP America is the flagship and the UK have their own conference. I would really like to see in the future, an international APMP conference being hosted in different countries. The highlight would be for South Africa to host an international APMP conference—that would be awesome! The world is getting smaller and we talk about sharing principles. We can only really share principles if we stand in each other's shoes. A good example of how South Africa can make its unique mark is the FIFA soccer world cup—with the vuvuzela we gave it a new flavor. Business can do the same thing, and I would like to have all the international APMP people come here and share their principles with us here. Many things that even the Americans battle with or are frustrated by might be basic. We are still growing in South Africa and a lot of how we do things is basic—we've mastered the basics. What better way to go back to the basics than to have an international conference in South Africa. We have a lot of passion and enthusiasm in South Africa that we can inject. Because this has never happened in SA before, there is no set format or restriction—we can be as creative and broad as we think would add value. It would be fresh and inspirational and give the conference a new angle.

Writing Proposals

What do you like about writing proposals?

The first bit is always frustrating—deciding where do we start; looking at the complexity of the proposal, trying to understand it. Then the good feeling comes when the proposal starts coming together and the best is when it's complete. It feels great knowing that the process worked, you managed to work through the huge amount of information and deliver the final product. It's a

I would really like to see in the future, an international APMP conference being hosted in different countries. The highlight would be for South Africa to host an international APMP conference—that would be awesome!

growth process you go through – working through a huge amount of information, sifting and picking the best parts and looking at your final product that you feel confident can convince the client. I love it when a client comes back and says "Wow! What an impressive proposal."

Confess the worst thing that ever went wrong for you with a bid.

We had a very clever graphic idea. This had to be done at a print house. There was a huge communication gap between us and the printers and everything came out upside down and back to front. So you could only read the document with a mirror! The end result was a basic word format submission with NO creativity and a huge print bill.

We also missed submission once. We made the assumption that delivery will be at the client, but it wasn't. It was at a different consultant, in a different city! And our team was wondering why no one else was at the client site when we submitted our proposal on time. So it really helps to read the Terms of Reference.

What are the special challenges and joys you face doing bids in Africa?

Our biggest challenges are language and culture. It's not easy to try and imagine the way people think. That forces you to go back to the very basics and not to try and be too clever or too creative. People just don't understand it and you can mess up badly. So the most important lesson for me is going back to basics. I don't think we do it enough.

Share some of your strong titles and interesting bid packaging ideas.

It depends so much on the customer and the branding. A few years ago it was all about the "show." The one proposal was delivered by an official, dressed in black with white gloves in a limo. It was sealed in leather box with the title "Too Hot to Handle." We won the deal. A pre-paid phone service for Parliament was called "A Long Talk to Freedom" (playing on the title of Nelson Mandela's autobiography titled *A Long Walk to Freedom*). We also submitted a full proposal for a pharmaceutical company in a pill box and a chocolate manufacturer proposal in a gold homemade chocolate box with the title "your time for a treat." It depends on what you offer and your client.

Do you have any advice to young professionals starting a career in proposals?

You need patience. The most important thing is to realize that your clients don't necessarily think the way that you think. Give people time to get used to your process, to realize the benefit that proposal people can add, gain trust, let people experience the benefit. Managing people is the hard part, it's not the overtime, nor the stress – that's fun. Nothing beats that adrenaline rush before the deadline.

The most important thing is to realize that your clients don't necessarily think the way that you think.

Author Bio

Sandy Pullinger, APM.APMP is the first chairperson of APMP South Africa. She has been writing proposals since 1992 and consulting in the field since 2001, when she founded the proposal consultancy nFold. Sandy is a seasoned entrepreneur. She has more than 20 years' experience in the software and Internet sectors, gained in various sales, marketing and new business development roles working for an Internet Service Provider and a software distributor. She graduated from UCT in Computer Science with first-class honours and is educated in business strategy. In 2006, she was selected as a finalist for "Top ICT Businesswoman of Africa" by ForgeAhead.

Case Study: An American (a)Broad:

The story of one small business expanding internationally

By Colleen Jolly, PPF.APMP

How one American business established a new proposal support office in London.


GAUTRAIN
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I am an American businesswoman who fell in love with traveling and had to find a way to support my habit. This case study, written in the first person, is my experience building relationships outside of the United States (US), opening a United Kingdom (UK)-based office, and continuing to expand into other English-speaking countries such as Australia. My story, currently spanning five years, is not unique from other entrepreneurs in that I had an idea, zero experience, and a whole lot of unflagging courage.

While my advice and recommendations are geared towards assisting US-based small businesses expand or establish their international business, many of the resources listed are also applicable, or have related services, to support investing from countries outside of the US.

Where did this idea come from?

My company provides visual communications support in the form of training and direct consulting work. After conducting my first international business trip in 2006, I realized that many visual products (printed, presented, web-based, etc.) have universal similarities and that perhaps there would be a market for our services outside of the US if modified in culturally relevant ways. At this point, I had no international business experience (I had been out of the US twice before—once to the Bahamas and once to Uganda via a 12-hour layover in London), no budget, no team to assist, and no legal advice.

Where do I even start?

I simply started talking about it—my dream to build something (a branch, a subsidiary, a satellite, a mystical "something" that reflected what my company already did) outside the US. Many business self-help gurus espouse the idea of visualizing the future you want by either using a vision board—a physical or electronic collection of ideal images (vacations, spouses, etc.)—or simply writing down your goals. Many of them believe you will achieve your goals faster by using this technique. I like talking, so I started talking about what I wanted and when I wanted it. Talking about my goals and dreams helped—a lot. It helped me to understand what I wanted and to start to believe I could do it; more importantly, however, the more people I talked to the more opportunities I received.

Resource #1:

Pick a country, and visit the website of their embassy in the US. Many countries are extremely excited to talk to entrepreneurs and business owners of all sizes about exporting or opening local offices (or branches, subsidiaries, etc.) in their home countries. Many embassies offer free information on their websites about how to do business in their country and some offer free direct help. One such country is the UK, which maintains an inward and outward investment assistance department of the UK Government called UK Trade and Investment (UKTI): http://www.ukti.gov.uk.

Another similar resource is Austrade, Australia's investment assistance body (http://www.austrade.gov.au), which functions similarly to UKTI in providing advice, research, and networking opportunities to inward and outward investors to Australia.

I live in Washington, DC, and fortunately, many embassies are located there and are active in hosting business and cultural events. I attended a free event at the British embassy that a friend had found out about and passed along to me, regarding human resource concerns in the UK. While not exactly the information I needed immediately to grow (or even start) my UK business, I went anyway. Simply attending allowed me to meet other companies interested in networking and to be introduced to UKTI. I never imagined there could be free resources to help me grow my business internationally.

RESOURCES

Resource #2:

Start locally—especially if you do not live somewhere that has easily accessible embassies. Go to the websites of your local Chamber of Commerce, county government, and state government to identify the resources you have at a local level and you might just be surprised. As of this year, the Small Business Administration (SBA) is sponsoring a pilot program specifically designed to provide states with grant money that can in turn be used to support small businesses starting to export or seeking to increase the value of their current exports (State Trade and Export Promotion [STEP]) Pilot Grant Initiative, CFDA# 59.061).

The British embassy people I met at my first event introduced me to both the Fairfax County Chamber of Commerce (FCCC) International Business Council (IBC) http://www.fairfaxchamber.org (my business is located in Fairfax County, Virginia) and the Virginia Economic Development Partnership (VEDP) at http://www.vedp.org. Both organizations provide free or inexpensive and highly government-subsidized support for inward and outward investors, and offer networking opportunities and other business-matchmaking activities.

Resource #3:

Concerned that your local or state governments do not have the programs or funds to support your international expansion? Try http://export.gov. The National Export Initiative (export.gov) provides extensive online resources and access to in-person assistance both in the US and in many countries around the world. Still not enough resources? Try: http://www.buyusa.gov. This official site of the US Commercial Service (http://trade.gov/cs) can help whether you are a US-based company looking to export or from another country looking for a US partner.

I tend to follow the maxim of “more is more” and so I became a “client” of my county organization, my state organization, my local county organization, my federal organization, and just about everyone in between that had the words “business,” “international,” and, most importantly, “free” somewhere in their mission statement. Through cultivating these relationships, I was (and continue to be) placed in front of networking opportunities, trade missions (inexpensive and organized business meetings in foreign countries), and other opportunities to promote my business such as writing articles and speaking at events.

Previously, I would have expected such professional-level support to be expensive but I found that most of their advice/services were free or heavily subsidized by the various local, state, and national governments.

Australian Government
Australian Trade Commission
http://www.austrade.gov.au

BRITISH AIRWAYS
http://businessconnect.ba.com

FAIRFAX COUNTY CHAMBER OF COMMERCE
The Voice of Business in Northern Virginia™
http://www.fairfaxchamber.org

MINISTRY OF DEFENCE DCB DEFENCE CONTRACTS BULLETIN
http://www.contracts.mod.uk

NEI NATIONAL EXPORT INITIATIVE www.export.gov
http://export.gov

Regus
http://www.regus.com

tenders direct® the smart way to win contracts
http://www.TendersDirect.co.uk

UK APMP Association of Proposal Management Professionals
http://www.ukapmp.co.uk

UK TRADE & INVESTMENT
http://www.ukti.gov.uk

U.S. COMMERCIAL SERVICE
http://trade.gov/cs/

Virginia
http://www.vedp.org/

Why the UK?

1. Americans and Brits more or less speak the same language.
2. Americans and Brits have a similar culture.
3. The APMP had a strong presence in the UK (well, at least I had heard there was a chapter over there), which told me there could be a market for our services.
4. I had visited the UK (once).
5. I liked London.

I initially picked the UK over other countries to expand in for a few key reasons that completely made sense to my naïve international business sensibility.

Of my top five original reasons to do business in the UK and to use that country as the launching ground for my amazing new visual communications empire, only one was actually accurate after scrutinizing the marketplace now five years later. The APMP does have a strong presence in the UK and continues to grow. The UK APMP chapter (http://www.ukapmp.co.uk) was founded in 2001 and now has more than 1,000 affiliated members, second only in sheer numerical size to the National Capitol Area (NCA) chapter.

They have regular and well-attended meetings, a multi-day annual conference with top-notch speakers (including Alastair Campbell, the "Karl Rove" of the former Prime Minister Tony Blair's administration) and a highly sophisticated marketing presence that regularly draws new vendors and new members to the Association. The UK APMP chapter focuses mostly on the mainland UK but also reaches into Northern Ireland and regularly attracts continental European visitors. There are also several familiar US-based or parent proposal-related firms present in the UK, such as Shipley, Strategic Proposals, and Qvidian (formerly known as Sant), to name but a few.

There are also several large multinational firms that maintain a presence in the UK familiar to the US federal contracting world, such as Boeing, Northrop Grumman, and Lockheed Martin. These provide similar defense-related services to the UK Ministry of Defence (MOD) and the Home Office (their version of the Department of Homeland Security). The UK chapter has been a source of past overall APMP CEOs, like Tony Birch, and it was the UK chapter that led the initial charge for creating the APMP's accreditation program. This was definitely a market that did not need to be built "from the ground up," nor was it one that I could waltz into and expect to be handed heaping piles of those funny colored pieces of paper they call money, but it was a more than adequate place to start.

I have since used criteria #3, the presence of the APMP in a country, to take me to Germany, South Africa, and Australia looking for more potential international clients and speaking at APMP events. Why do all the hard work identifying potential members and clearing a path when so many far more qualified

and pioneering people had done it before me? It seems significantly easier to stand on the shoulders of giants then for a mere mortal to become a giant.

I have learned, and continue to learn on every visit to the UK, that we do not in fact share a common language or a common culture. Many a company (according to the US State Department and Census Bureau: "US exports of goods and services to the UK in 2010 totaled $48.5 billion, while US imports from the UK totaled $49.8 billion.") go to the UK thinking we are brothers or at the very least cousins.

A friend gave me the best card on the first birthday I had after my first business trip to the UK. On the front it had an English bulldog sitting by Parliament with the Union Jack flapping in the background and said: "Do you know how they say Happy Birthday in London?" On the inside it cheekily answered itself: "Happy Birthday! We speak the same language, you know." I still cannot think of that card without laughing. Oh, little did I know about traveling and speaking with people from other countries and cultures—how could I possibly begin to think we could do business together!

Fortunately, I was correct in that I had been to London before—my first trip was a layover on the way to Uganda. Now, five years after regularly traveling to London, I still like it, and even look forward to going back. We had less than 12 hours on my very first trip to learn how to navigate the tube, feed ourselves, and see all the sites in case we never made it back. Being a fairly industrious person I did see most of the typical tourists sites, or at least the ones that are closest together, including the London Eye, Westminster Abby, Parliament, Big Ben, the Thames, Trafalgar Square, Piccadilly Circus, and the inside of an actual British pub.

Hindsight is, as they say, "20-20," and in retrospect, I had very little to go on other than a hunch that this could work coupled with a strong desire to try. I actually believed there was a market for our services and that we would thrive. So I did what any sensible person trying to sell a crazy idea to three other people would do—I wrote a business plan with all of the detailed research I received for free from my various governmental sources. Because this is what we do, it was a very fine looking document full of beautifully illustrated and informative graphics.

I presented this 80+ page annotated document with a 10-slide complimentary PowerPoint presentation to my business partners and, fortunately because they had no idea how to do international business either, I was given the blessing to proceed as long as I funded the operation myself as much as possible. Historically, we have been a "boot-strap" organization funding the beginnings of the company on credit cards, well wishes, and the occasional first born son sold to elves to make payroll. It is not a trustworthy or credit-worthy issue, it is the ingrained sense of anything that is worth doing is worth proving that it is worth doing. We call it having "skin in the game." Anyone, well most anyone, can take a large sum of money and make it into something—at least for a while. It is both harder and more rewarding to take no money and a dream and build an empire.

I have learned, and continue to learn on every visit to the UK, that we do not in fact share a common language or a common culture.

Never Underestimate the Power of Free

To fund my new venture I had to get very creative. Fortunately, the Commonwealth of Virginia offers several grants to small businesses expanding overseas that include actual money and useful training, coupled with access to industry experts in fields such as international banking, translation, and marketing. I have now successfully won two of these grants totaling $15,000, and have direct sales (in that someone I met directly connected to the Commonwealth of Virginia or an activity/opportunity they sponsored) of more than $30,000 with more opportunities almost magically appearing every day.

These numbers do not account for the tens of thousands of dollars worth of research, advice, marketing, a friendly and non-judgmental ear, and most importantly access that I have received through my relationships at the state and local levels. I found out about these opportunities by simply asking what was available. If I had a burning need for an introduction to a potential client or wanted to be featured in a publication, I did not wander around the Internet bemoaning the people who seem to have all the luck—I asked. And whether or not I received exactly what I was looking for, I was always appreciative.

Most of the initial start-up costs for any international business expansion are travel-related. This is significantly more expensive than traveling domestically, especially when you consider ever-changing currency rates. To help minimize travel costs, I traded graphic design services for lodging and when that did not work, begged friends to sleep on their couches while in the UK to save money on hotel bills.

I even managed to win a British Airways (BA) competition that included 10 free business class flights anywhere BA flies. The inaugural "Face-to-Face" program started because BA did a study with Harvard University that proved business conducted face-to-face rather than by phone or email was more successful, particularly for small businesses. The contest involved a series of essays about what my business did, what I was currently doing to expand internationally, and what winning 10 free flights would mean specifically to a small company since the competition had staff size and gross revenue limits. I am not sure how many other companies I beat to win, but I do know I saved thousands of dollars and was able to visit new markets I had not even considered, including South Africa and Australia. The current incarnation of the program is a little more involved, and includes a video submission and an in-person interview. You can find out more about it at http://facetoface.ba.com.

By scouring LinkedIn and other listservs for information, I invited myself to every free UK-based business event in the local Washington, DC Metro area (including so many at the British embassy that the guards and I were on a first-name basis and I got invited to the staff holiday party). I leveraged connections made at those events to get invited to London-based events, which furthered my in-country network. I thrust a business card at anyone I met and asked for advice. I picked up a lot of opinions the first couple of years and found some extremely useful nuggets of information and recommendations for things I would have had difficulty sourcing myself, such as UK legal and accounting help.

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As I was networking I discovered that the concept of being local was very important to the British—more important than in the States where you are frequently working virtually with people from all over the country, and making sales and developing relationships with only a voice on the phone or a name at the end of an email. The British do work well virtually but prefer to meet and understand you before they commit to doing business. They, or at least the people I spoke with, appreciated the concept of localization so much that I started equating British networking and business with dating. First you identify the potential for a common interest and engage contact details, then the most interested party initiates contact and you perhaps exchange a few emails or phone calls to confirm there is indeed some spark. You meet in person for a drink or dinner and chat further about your potential future together.

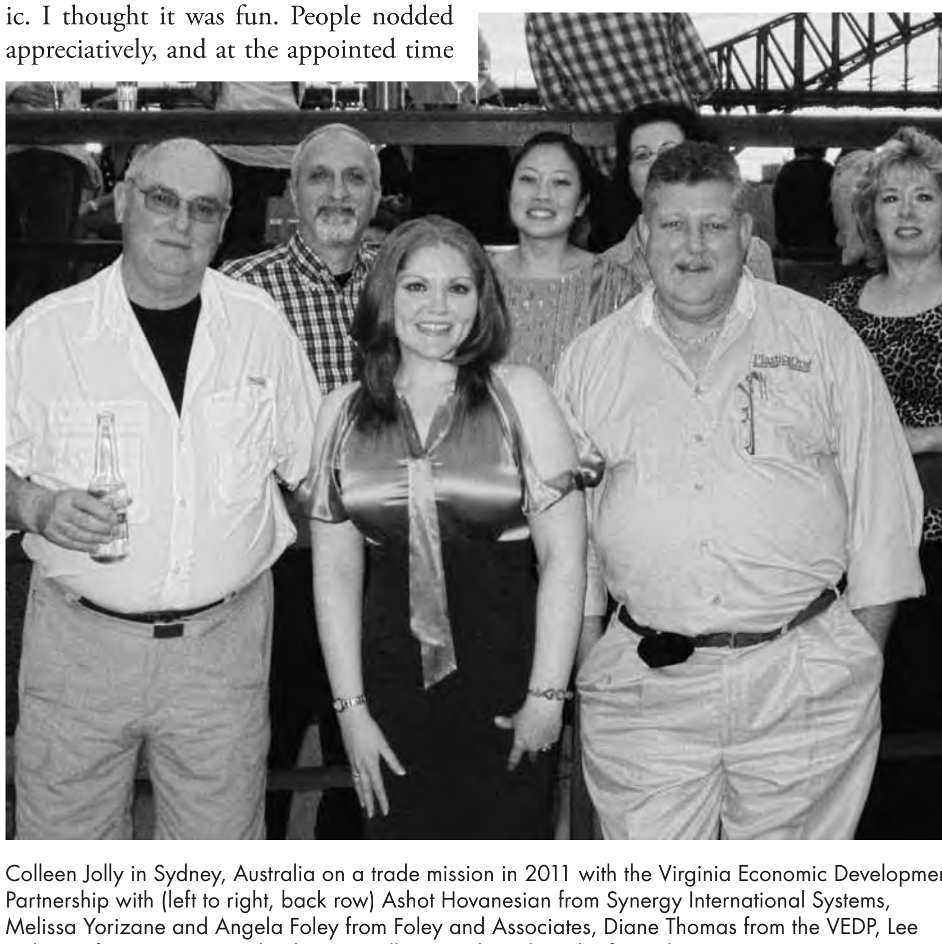
No one wants to commit to anything serious after the first date, so after a firm handshake goodnight you resolve to meet again or perhaps just to keep in touch. Several of these interactions later and you might have a real relationship starting. If the timing is right, then perhaps you make a more serious go together—out in front of people where you and your compatriot's reputations on are on the line. If there is a success, then you might just have found yourself a new set of in-laws, or at least a proposal team to support regularly with information graphics and high-quality production support.

Meet Zed, just another letter or something more sinister?

This all really started when I was invited to speak at the 2006 UK APMP conference. I could not wait for my first real international business trip! I updated all of my presentation material, or so I thought, and conducted the talk twice, presenting to the majority of total conference attendees. Since I had no idea what level of understanding they might have about the way we codified information graphics and visual communications, I decided to start with the basics and launched into a discussion of "Design 101." I talked about color and fonts, and we did a great little exercise about conceptualizing a graphic. I thought it was fun. People nodded appreciatively, and at the appointed time they left. The next group came in and it was rinse and repeat. I beamed with pride that I had survived, and people seemed to like what I had to say.

That is when I met Zed. American spelling is full of the letter "Z." Full of it when you stop and actually look. In a game of Scrabble® it is worth quite a few points and I think it is very lucky to pluck a "Z"-labeled game piece. The British do not like "Zs." They use the letter "S" in place of most "Zs" (or Zeds as they call them), they add "Us" in funny places, and occasionally mess up the spellings of normal, little words like "centre" and "tyre." An American is mostly forgiven for calling a "lift" an "elevator" or forgetting where the "boot" of a car is, but making these egregious spelling mistakes AND using a completely American euphemism in a business setting (they do not number their courses in increasing order relating to complexity like Americans do, so the label of "101" referring to a basic class rather than a master class was completely lost on my audience) really made me look at best amateurish and at worst lazy.

I did not wander around the Internet bemoaning the people who seem to have all the luck—I asked. And whether or not I received exactly what I was looking for, I was always appreciative.



Colleen Jolly in Sydney, Australia on a trade mission in 2011 with the Virginia Economic Development Partnership with (left to right, back row) Ashot Hovanesian from Synergy International Systems, Melissa Yorizane and Angela Foley from Foley and Associates, Diane Thomas from the VEDP, Lee Osborne from Ceramic Technologies, Colleen, and Mark Kesler from Plastics One Inc.

I learned two valuable lessons that day. The first was if I wanted to succeed I had to follow my own oft-proffered advice—I would have to learn to think like my intended audience—and second was that if I did not ask, no one was going to tell me I screwed up—the British were far too polite or perhaps just too reticent to tell me (unless they had a pint or two in them).

I started asking questions about things I thought were straightforward and should be universal. I re-learned the most important rule of business, and perhaps the most important rule about life—I actually knew very little. What I was starting to realize was that being too American and not local enough was going to be a barrier in this market.

I could do nothing about my American accent or sensibilities, so I started to outsource. I hired a part-time sales guy to help me. I joked and told him that his biggest value was simply that he could "be" British and the very act of him sitting next to me and nodding appreciatively with perhaps a small murmur of "she's got her head screwed on the right way, she does" over his cup of tea to a potential client would seal the deal.

First through an independent small business incubator and then later through a Regus facility, I started a virtual office service. For a small fee, typically between \$100-200 per month, I could officially use a local UK address as my address of record and receive physical mail. It also had the benefit of phone service. I now had a UK office phone number cheerily answered by a British person who would always say I was "out of the office at the moment" and then would cheerily email me whatever message was left.

Resource #4:

Regus: http://www.regus.com has virtual and small business incubator office space available in many countries all over the world. Once you open an office, you also receive a Regus Gold Card that allows you entrance into any Regus Business lounge—a great place to check email, make copies, and generally chill out when you are traveling and do not have access to the comforts of your own office.

I hired solicitors, recommended through my growing network, to help me navigate business paperwork, taxes, and the mystical world of Value Added Tax or simply VAT. I paid for these services using grants won through the Commonwealth of Virginia. I asked the researchers through my networks and my contacts through the APMP how much I could charge for services and how best to bill or invoice clients.

I modified our company branding and logo to be less "Americanized" in visual style, re-worked our marketing materials to at the very least be spelled correctly for the British audience, and purchased a co.uk domain for our separate company website. My usual title of "Principal" meant nothing in the UK so I donned the title of "Managing Director" and put that on my new less-American business cards.

Now that I was armed in significantly more relevant audience colors and styles with my helpful but often exasperated UK-based solicitors, I was able to start actually selling. I officially launched 24 Hour Company UK LTD in October 2008 after three business trips to the UK, countless emails and phone calls, and with lots and lots of hope.

The next day the UK news reported that the country was officially mired in a recession and credit crunch, and the global tightening of the belt was in full effect.

Does a proposal by any other name still smell as sweet?

It is important to note that proposals are not proposals in the UK. Typically they are bids, sometimes they are tenders, infrequently are they proposals. The UK has very different definitions for what these terms, as interchangeable as they are in the States, actually mean. They have never heard of an RFP (Request for Proposal) but have a rather posh sounding ITT (Invitation to Tender). Documents are sized for international standards or A4 for "regular" paper and A3 for what we would call a foldout though they still use Microsoft® Word, PowerPoint, and Excel as their major delivery methods.

Bids are organized in the same way that you would expect in the US, with small teams wearing multiple hats, and large teams being more hierarchical with more people involved and more, but certainly not always, clearly defined roles. The focus in the UK tends not to be on public sector work—what the US thinks of as 'government' work—but percentage-wise is split between answering formal tenders from the local and national government and commercial or private sector work. The government-type work in the UK is a smaller market then the giant, US federal expenditures, and there is more border-crossing into Europe and elsewhere for bids.

I could do nothing about my American accent or sensibilities, so I started to outsource.

Resource #5:

There are similar corporate and government run websites such as Input.com and FedBizOpps.gov in the States where you can search for bidding opportunities. TendersDirect.co.uk searches for UK and European Union [EU] opportunities from both the public and private sectors. The MOD has an electronic vehicle, the Defence Contract Bulletin, found at contracts.mod.uk, with links to European sites and useful information on how to sell to the MOD for large and small businesses. The industries are similarly structured as in the US with the Defence and Home Office, the UK version of the Department of Homeland Security, being most similar in structure and response requirements as their US counterparts.

Stylistically, red is a much more popular and frequently used color in the UK than in the US. In the US federal arena, red can be a danger or warning color whereas blue, the most popular color for corporate logos, is a safe shade to use in almost any circumstance. Red is very popular with UK corporate logos and does not have the same danger stigma. More white space and fewer gradients, drop shadows, and other visual enhancements are more common in the UK but no proposal, bid, or tender team in any country will have an all-or-never mentality. Just as there are teams in the States that prefer cleaner visual lines, there are teams in the UK that want loads of photo-collages and fancy effects.

Fortunately, the first and most important lesson about preparing your response is still the same on both sides of the Atlantic: You must remember your customer and reflect them in the words, graphics, page layout, and in every nook and cranny of your documents or presentations. You must follow whatever directions or instructions they have provided you and, of course, you must submit on time.

A good writer, manager, graphic designer, or any other proposal professional could easily, if given a style sample to mimic, do at the very least a good job prepping a submission in Swindon as easily as in Schenectady. To do a great job, you need to really learn about your team and their customer. Without a lot of practice and/or being completely immersed in the culture of the UK or any other country, small cultural differences will appear in your visual and written style that may be incongruent with the local 'flair' and cost you the win. (continued)

Fortunately, the first and most important lesson about preparing your response is still the same on both sides of the Atlantic: You must remember your customer and reflect them in the words, graphics, page layout, and in every nook and cranny of your documents or presentations.

Right now.
There's no tomorrow.
Right now.
Gotta do it right, here and now.

Right now I am sitting on a plane, a place I find myself far too frequently. I am heading back to the US from our second successful paying project in Australia and the first one that I delivered in person. In one computer-window I am reading a thoughtful note from my new UK-based insurance salesman explaining the equivalent of Workers Compensation insurance to cover the two new designers based in Liverpool I have just hired for our UK office, and in another window I am reviewing our sales figures for the US operation last week.

I am compiling a list of all the people I have to talk to about my recent Australia trip in a third window. I must meet with my business partners to discuss our continuing "Down Under" sales strategy, call my contact with the Australian State of Victoria government to thank her for the good luck platypus pin (the state animal) that indeed was good luck, and I need to file my expense reports with my finance folks who rightfully believe I am a loose-cannon with no respect for rogue international calling on my iPhone and properly submitting receipts.

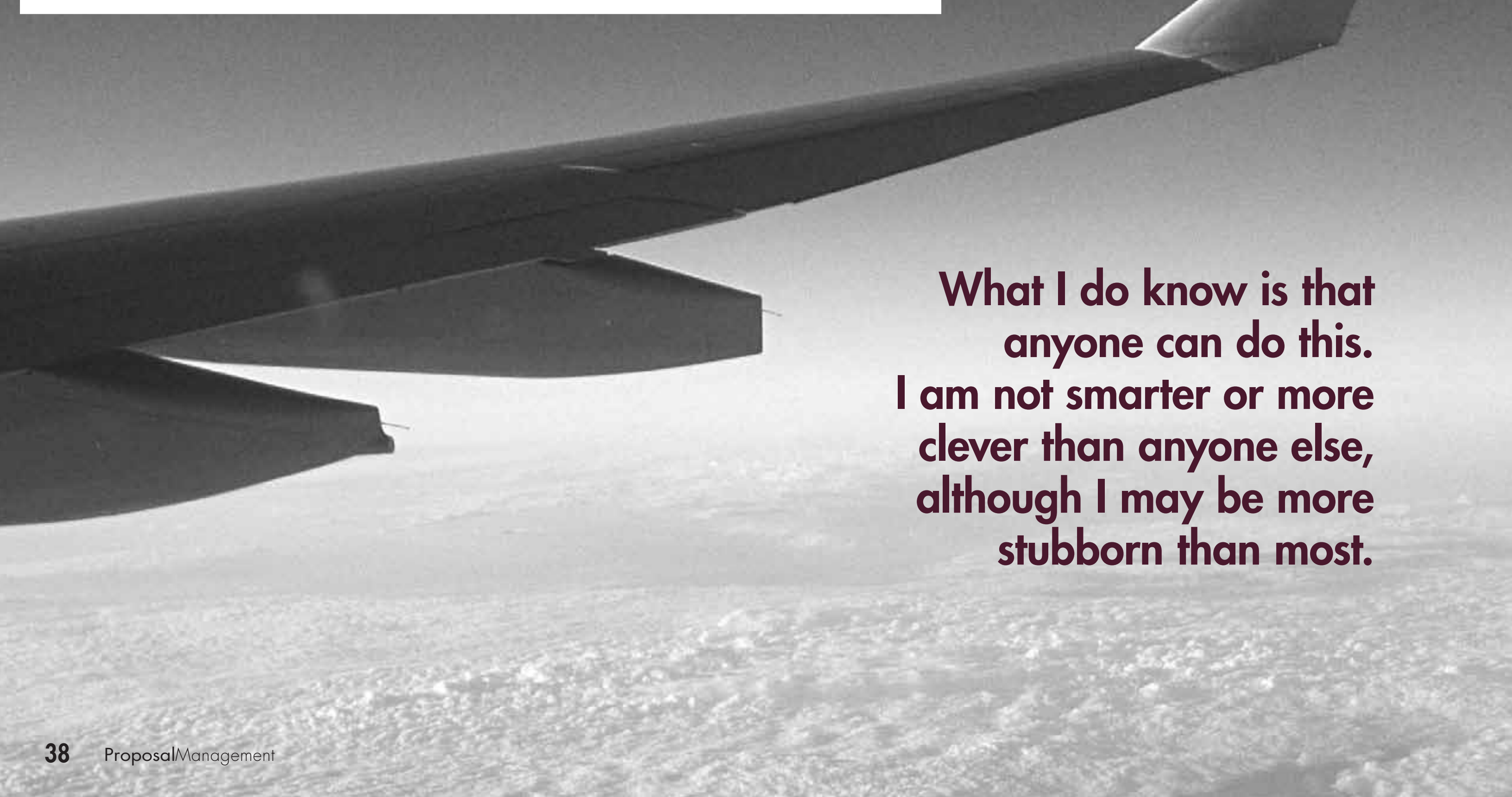
I am a lot farther along in my understanding of international business than I was five years ago. My list for doing business in Australia now no longer contains things like "well, Sydney is nice" and "I like the food in Melbourne," but instead focuses on the numerical value, insomuch as that can be calculated, of maintaining this opportunity and the feasibility of its continued success. My crystal ball stopped working several months back, so I resort to taming Excel and staring between the lines hoping to catch a glimpse of "you are going in the right direction" in glowing text under the columns of numbers that never seem to add up right.

I do know that I tentatively consider the UK operation a success. I made myself a promise in 2008 that by 2012 I would have someone, ideally 1.5 to 2 full-time equivalents (FTEs) worth of someone's time, on the ground in the UK. I had always presumed this would be me (I am still working on the cloning part to make up the spare bits of FTE) and that if I had to sell my house and a kidney to do it, I would make it happen.

Now, like most things in life, it appears that I have two FTEs in the UK through a combination of determination and serendipity and, dare I say it, a pipeline of new work to keep them employed that did not involve plunging myself into debt or selling organs. I also have clients and a tiny bit of market penetration in South Africa and the Netherlands, and a growing (I am going to stop short of saying "thriving" so that I do not jinx it) business in Australia, one that is starting to take up real time and brain space that I did not expect to be parting with.

What do all these countries have in common? English is the standard language of business around the world and, through television, movies, and the Internet, people around the world have a sense, if not a complete grasp of American culture. I have also personally been to all of these countries, but the real difference and the real reason why I have been successful in any of these places is because the APMP was there first. Pioneering men and women built a structure, gathered the listless, wondering tribes of proposal professionals, and linked them together.

The value of having a global association extends beyond personal business interests to having safe space to share ideas and to



What I do know is that anyone can do this. I am not smarter or more clever than anyone else, although I may be more stubborn than most.

feel like you are not alone. I spoke at the first South African one-day conference in Johannesburg in 2010. Everyone was very kind and attentive to the speakers, and I am sure everyone learned something that day. The biggest discussion point during breaks and over meals was not a revolutionary way to improve their bids but that they had found each other—that there were other people locally and internationally that understood their individual issues and concerns. That feeling of community is the strongest and the best reason to be involved with the APMP. I saw this same sentiment echoed in Perth, Australia in March 2011 at the largest gathering of bid and proposal professionals ever, certainly in Perth and probably in Australia. It was not an APMP event but could have been with several of the Australia/New Zealand chapter leadership in attendance.

Nothing I have done has been revolutionary, and arguably some of the things I have done are really, really dumb. Maybe I should have taken out a loan to not worry about the costs as much. Maybe if I had moved to the UK full time I would have been more successful faster. Maybe we should have licensed our intellectual property and franchised rather than attempting to start an office. Maybe I should not have started in the UK at all—maybe it was the wrong country for a first try. Maybe this entire international business thing just took me away from business in the States and we could have grown more, faster, and with greater focus. I do not know the answers to any of these questions and I doubt I ever will.

What I do know is that anyone can do this. I am not smarter or more clever than anyone else, although I may be more stubborn than most. The only business experience I have are my own mistakes and those my business partners made before I joined them—and even some of those I have insisted on re-learning personally. There are numerous free or inexpensive resources available to help you start a branch of your company overseas or to start a completely new endeavor, and the Internet is the best place to look first. Start believing that if you truly want to try, you could actually succeed.

I have been, and I hope will continue to be, successful in my international business endeavors for two reasons: I had no idea what I was getting into, and someone else had blazed the trail—I only had to follow the light and believe that it was possible.

Colleen Jolly presents to APMP members and proposal professionals in Johannesburg, South Africa

Author Bio

Colleen Jolly, PPF.APMP, a 12 year proposal veteran, manages a professional visual communications company twice listed on the Inc. 5,000 list of fastest growing US-based companies—24 Hour Company—with offices in the US and UK. Colleen is very active in the APMP as Secretary for the International APMP and the NCA chapter. She was named an APMP Fellow in 2010, is Layout Editor for the APMP *Journal*, and regularly contributes articles. She is a frequent worldwide speaker on creative and general business topics, and has spoken at most APMP events around the world. She holds a BA from Georgetown University and is an award-winning artist and businesswoman—most recently featured in *Northern Virginia* magazine's "Top 10 Entrepreneurs Under 30." She is active in leadership roles in arts and women's non-profit organizations and has been published five times in a women's entrepreneurial calendar.

It's Not the Destination…!

by Marilyn Moldovan, PPF.APMP

How someone who did not believe in the Accreditation Process went the distance and became a believer and a proponent along the way.

At first, I was angry by the announcement of APMP's Accreditation Process. I did not believe it would and could apply to seasoned professionals like me. What could they teach us that was new? Realization set in that to keep up and keep pace, I had to "get with the program."

First, I had to overcome fears of failure and jump in. Once I passed the first hurdle, I was off and running and could not wait to get to the finish line. Each step was the motivation for the next. As I "conquered" each, I realized the monsters were in my mind. Accreditation mentors like Cathy Day were a guiding force; I and many others could never have done it without them.

The learning experience was tremendous; even a wily veteran like me had a lot to learn. Not only did the Accreditation Process serve as a refresher on some theories and tactics that I knew well, but I learned new processes that could be applied to my current work environment. Amazing! I realized that I did not know it all and believe now that I never will; learning is a never-ending process. However, the Accreditation Process has made me a more developed proposal professional and a more confident person. The accreditation journey was an exciting part of that process.

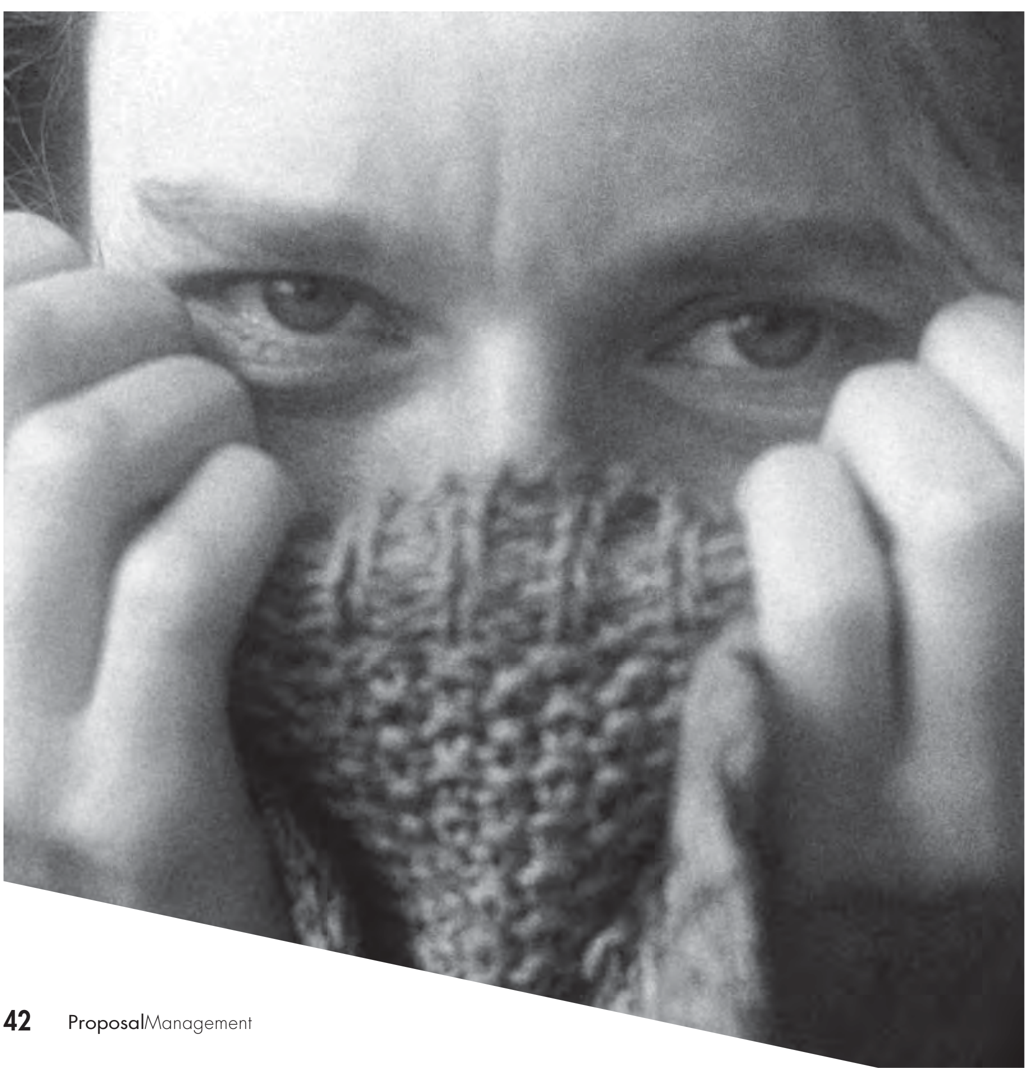
"It's not the destination…It's the journey!" Many motivational speeches begin with this expression, and we may all be tired of hearing it. I sure was, until I began to work my way through the well-planned and thought-out Accreditation Program. That is when I became a firm believer in the expression. As I refreshed my knowledge of the basics of the proposal tenets, I reinforced how far I had come since my first days as a proposal coordinator. Just as with the accreditation journey, I followed a career path in proposal management that started as a coordinator, advanced to specialist, and culminated with promotion to manager. The different levels reflected the efforts I was assigned, both in dollar amount and size. I realized my career path reflected the various levels of the Accreditation Program.

Exhibit 1

When APMP announced the Accreditation Program was to be introduced to the United States (after a successful introduction in the United Kingdom) at their 16th Annual Conference in Phoenix, AZ in 2005, I scoffed. Me? Certainly accreditation could not apply to me! At our 17th Annual Conference in New Orleans, LA, we discussed the details more closely…an examination, an extensive questionnaire, and an interview. I had been involved in proposals since time began (or so it seemed). Why should I be subjected to anyone's scrutiny and exams to be called a professional? Of course I was a professional! My colleagues and I all agreed. We were veterans. We should be grandfathered and automatically granted the rank of "Professional." No tests for us. No assessments for us. No one telling us we did not meet their standards. We knew we could stand up to anyone's standards. We waited patiently, and while confident it would happen, no one mentioned grandfathering. As stated: "*The APMP offers the world's first Professional Accreditation Program for those working in a bids and proposals environment. The Program uses a process of examination and competency-based assessment, which is consistent and measured against world best practice standards*." Great, another money-making venture for someone. How come we did not think of this? We did not need APMP to tell us we were proposal professionals; we told ourselves—we did it every day. A pat on the back here; a pat on the back there…there were plenty of accolades to pass around. What was one more? We proved it every day when we delivered high-quality, winning proposals. What was going on here? What could this program do for seasoned professionals?

Something, however, began to nag at me, and I must admit I was conflicted even at the very beginning. I did believe strongly that those of us who had been in the industry for years should be grandfathered and automatically granted "Professional" status; I also recognized the limitations of doing that, i.e., where would you draw the line. Yes, it would work for my friends and me, but should it be applied to you and your friends? We did not know their qualifications as well as we knew our own, and could not vouch for you or your friends as much as we could vouch for each other. If the entire membership were to be grandfathered, then newer members might be intimidated. Examining it rationally I saw holes in grandfathering. I almost felt like a traitor to my colleagues by admitting that I liked the clear playing field with everyone starting from zero. I guess in the end that is what standards are all about…an even playing field for everyone…my friends and yours…and that is what APMP must have decided. It had to start somewhere, so why not start here and now.

After more thought, I realized I did not want to be left out in the cold. This was not a fad; this was here to stay. I had been an APMP member since the early 1990s, took my membership seriously, and was



We did not need APMP to tell us we were proposal professionals…

After more thought, I realized I did not want to be left out in the cold. This was not a fad; this was here to stay. I had been an APMP member since the early 1990s, took my membership seriously, and was proud of it.

proud of it. In the past, when APMP began its mentor program, I volunteered to participate. Why would I want to be left out of a new program now? So, I began to read everything that came out about accreditation. Rather than scoff, I became more educated about the process and soon realized I had been backing off because of nerves. What if I did not know as much as I thought I did about the way things should be done? Perhaps after all these years, it was time to stop fooling myself and find out the truth, no matter how painful. So, I thought, each journey begins with one step; I had better take my baby step and start my journey—then I said, "Maybe tomorrow."

I got a wake-up call at work. We began a major proposal and someone with absolutely no background in proposals was assigned as (do I hear a drum roll) the deputy proposal manager. My mouth hung open; through clenched teeth, I asked why and was told it was good for her career path. Her career path? What about the proposal and the career path of those within my department who had experience in proposal management and had defined it as their career path? What arguments did I have to counter this except experience that apparently was not considered? It did not matter; the answer was crystal clear to me. Anyone could call themselves a proposal anything. If only there was a way to endorse proposal professionals. Then I saw the light; there existed such a path. I just needed to take the first step. I needed to brace myself to become the lone explorer into new territory. Hopefully I would discover the validation I needed through the APMP Accreditation Program.

Exhibit 2

There were three levels of accreditation, each tested in a different way and each requiring a minimum level of experience and a reference. This journey did not seem too bad; no trip to the moon required here, but no Caribbean cruise either. The first accreditation level was Foundation… one year of experience. The milestones for success at this level consisted of a multiple choice exam (a snap; no problem) and a reference who could vouch that you had been in the proposal business for at least one year (again, easy sailing). Even though I had recently completed a postgraduate MBA degree program and was in the habit of studying, I began to worry about not performing well on the exam. I was an overachiever who did not face failure easily. Knowing that the APMP website had accreditation preparation tools, I went online and took a practice exam. Of course I could pass the exam, I thought. The first time I failed. I took it again; no way, failed again. In a quandary and full of doubt, I wondered what if I invested the money and then failed?

To say I worried is inadequate; proposals were my life. I had been doing this for 30 years. I should know this material like I know how to get up in the morning and put on my shoes. I should not have to

I went online and took a practice exam. Of course I could pass the exam, I thought.

The first time I failed.

Ed Alexander, PPF.APMP from Shipley Associates administers Foundation Level Accreditation training to students at the APMP Conference, Denver 2011.

take a course to tell me how to take this test. I took the sample test again, and this time, I passed. Big deal; even a monkey learns by rote. Still I felt relieved. Then, the third time was the charm. And yes, I took it a fourth time a week later and passed again, gaining more confidence.

I finally read what materials I should be reviewing in preparation for taking the test. (You would have thought I would have learned something from my MBA studies, but remember, I thought I knew it all!) Of course, the test would cover standards, processes, and procedures that were best practices in the industry. I was seeing that every day in the Northrop Grumman Corporation, and it was a relief that I was seeing that at APMP as well. It was not just what I had been doing every day; it was what I had been hearing every year at APMP conferences and reading in the APMP *Journal* and *The Perspective.*

I discussed my intentions with my manager, and we agreed that I would take the exam in Virginia and take advantage of the free review being offered beforehand. I thought that would lessen my test-stress. So, in January 2006 off I went to attend the Shipley-sponsored review and to take the exam. I was pleased to see the friendly and welcoming faces of David Winton, Tony Birch, and Cathy Day. At once I felt at home. The review was all-encompassing; the questions and answers engaging; the group ranged from newbies to oldies like me. Oh, but then the exam began.

Our proctor (I cannot remember who it was; was it Cathy? I do not know; my mind was paralyzed.) suggested we read over the questions once, answer those we knew immediately, then go back and answer those of which we were unsure. There were 75 questions to answer in an hour. That is 48 seconds a question without reading over the test. "*Get started*," I told myself, "*read over the questions."* That is when it hit me. Tests are the masters of their own perfect little storm, wielding unpredictability, chaos, and terror. Like my reactions to facing real natural forces, I was overcome with alternating bouts of tremors and paralyzing inaction.

Exhibit 3

Somehow my eyes focused on the far wall. No. That clock cannot be right. Oh, God; should I pray? What if I failed? How could I go home? What was I thinking? Someone said 15 minutes had passed. Oh no, I went back to the beginning and began to answer the questions. Once I got into the rhythm of the test, I found I could answer more. Yes, some I absolutely did not know, and there was a great variety among the

Tony Birch, PPF.APMP administers a Practitioner Level Accreditation Workshop to students at the APMP Converence, Denver 2011

APMP's Chief Examiner, Cathy Day, PPF.APMP administers a Practitioner Level Accreditation Workshop to students at the APMP Conference, Denver 2011

"Congratulations, you passed."

I may have asked her to repeat it; I do not know because I could not hear myself with the blood rushing in my ears. I could not believe it. I had passed!

questions—some on production, type fonts, management, and storyboards. How could someone pass this with just one year of experience? Why was I not concentrating on the test? It was as if I were engaged in a competitive tournament of *Scattergories,* with the clock ticking away the seconds! Why was my mind wandering? Oh no, did someone just say 15 minutes to go? I was sweating as if I were in a marathon; my hands were still shaking. This was an open book test, but I could not open the book because who had time to look in the index!

"Pens down; make sure your assigned numbers are on the papers, and turn in your papers!" Our destinies were sealed. We handed in our papers, meekly filed out of the room, and waited while the proctors graded our tests. Each of us was sure we had failed. We began to compare answers and complain like teenagers that the material had never been covered in class. *Can you believe they asked that? What did you get for that answer? Did you really answer that? What did you put down? Oh no, I was sure it was Helvetica; are you sure it was Tahoma?* On and on we went, wringing our hands, lamenting our fate as if we had handed in our theses and were waiting for our final graduation marks. Then, one by one we were called in to personally receive our pronouncement. Stomach flopping, hands visibly shaking, I walked in and almost broke out in tears when Cathy Day pronounced, "Congratulations, you passed." I may have asked her to repeat it; I do not know because I could not hear myself with the blood rushing in my ears. I could not believe it. I had passed! I had made the first hurdle. I did not need the plane to fly home; I could have made it on my own. The rest would be easy from now on — at least that is what I thought.

When I came down from Cloud 9, I took a look at the requirements for the second level—Practitioner**.** Practitioner Level requires a self assessment using the Proposal Practitioner Assessment Questionnaire (PPAQ™) that establishes your credentials to substantiate your application. You must provide the name of a reference to the APMP (e.g., your line manager, a peer, or a customer) who is prepared to confirm that you have worked for at least three years in a bid and proposals environment. The APMP Assessor would contact your reference to discuss a sample of your self-assessment. The telephone conversation would be at a time convenient to your reference, lasting 10–15 minutes. This PPAQ™ must be completed and submitted online.

As I went through the questions and evidence needed, my stress level again began to rise: how could I do this? It would never happen. I had 10 times the years needed and I (once again) did not think I could get there from here. The questionnaire stated it would take four hours—it took me about four months! Four hours—it took me 40 hours just to get some of the information together, though honestly, many of those hours were spent reminiscing about proposals of years past. I began to think that having so much experience was not a good thing; there were too many memories and too much data from which to choose. As

Whether good or bad, sometimes you feel like a veteran having flashbacks—the walk down memory lane justifies the work that goes into it.

I read over the questions, I doubted I had some of the experience; but as I drilled down and combined my training with my actual experience, I realized that my fears were unfounded. Admittedly, there were a couple of times, I contacted Cathy Day for clarification; that was a major help.

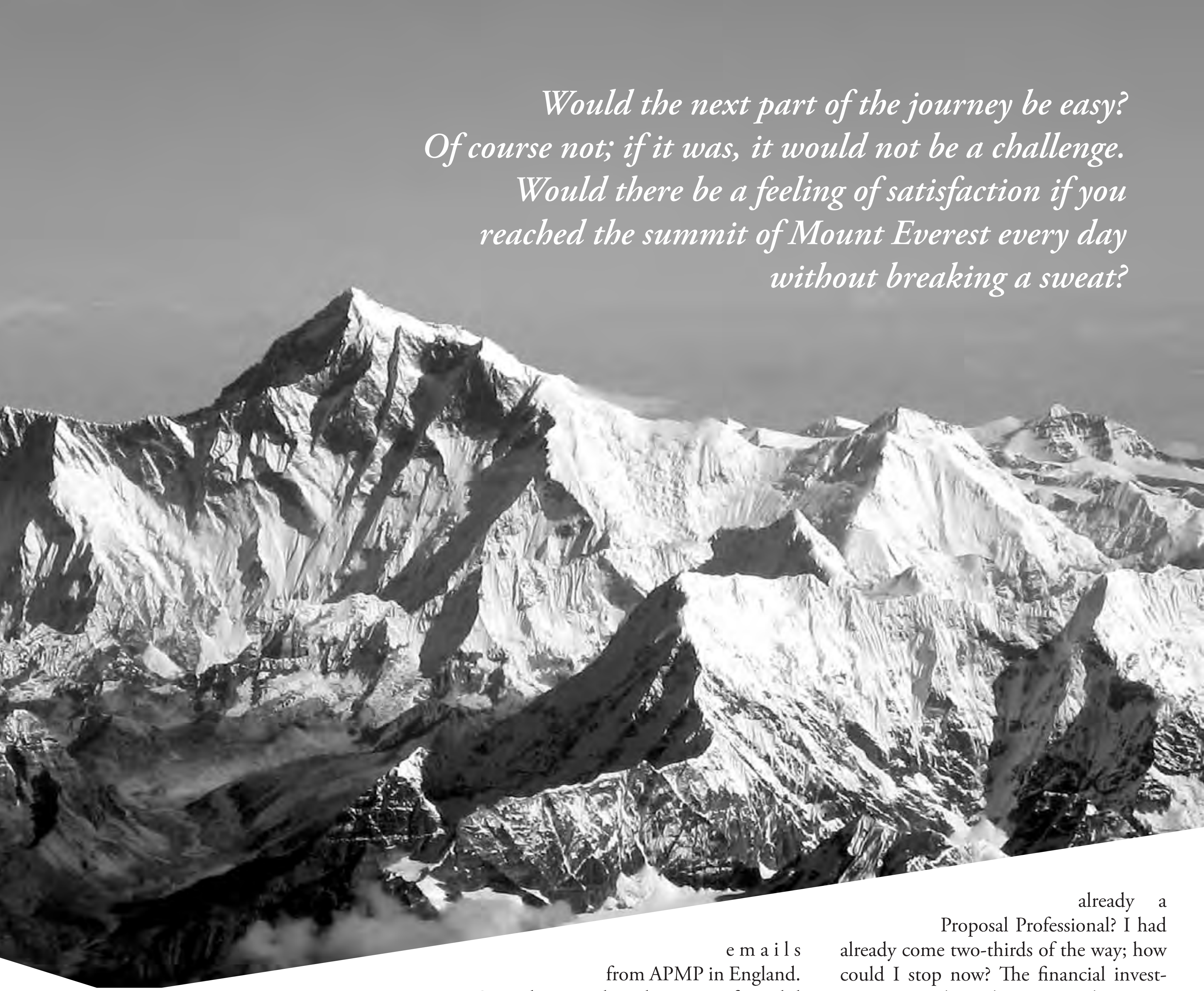
Exhibit 4

Why did it take me four months rather than four hours? Well, that is me! I spent a lot of that time setting it aside and searching for my reference material. I did take the advice offered online and downloaded the Microsoft® Word version of the PPAQ™ and used this document as my offline tool for "answering the mail." I treated my responses as if I were responding to an RFP. After all, that is what I do for a living. I cross-referenced my answers, as I do in a cross-reference matrix, against the key competency areas (KCAs). The easier I make it for my evaluator, the better my score will be.

For the questionnaire, I was able to cut and paste answers from this document into the online PPAQ™ when I was ready to complete it. Through this process, I could add and edit to my heart's content, and only when I was confident about my answers, did I cut and paste them into the online PPAQ™. I prepared it just as if I were preparing a proposal—create a first draft, review it, and revise it; create a second draft and revise it; then, prepare a final draft. Perhaps I micromanaged it; however, the PPAQ™ Standards and Guidelines were invaluable in guiding me as to what to use (training vs. hard experience) and where to put my evidence.

I am much more organized about my managerial responsibilities than I am about my own experience. For some of it I had to dig into old files to retrieve information—both physical and mental. When my memory got jogged—well, off I went down memory lane to renew old acquaintances, reminisce, make that phone call I had been meaning to make, write that note, etc. Answering those questions turned out to be one of the best times of my life. Well, not really, but if you are a seasoned player and go through it, you will know what I mean. Whether good or bad, sometimes you feel like a veteran having flashbacks—the walk down memory lane justifies the work that goes into it. Perhaps my responses were overkill; my examiner is better suited to judge that than I am. I have to tell you I included everything; once again, I over-thought it and was nervous when the "Send" button was hit.

When I set aside the anxiety of submission and focused on the rediscovery of my past, I realized the joy I experienced in the trip. I would do it all over again just to get back that feeling. I wish I could catalog those cherished memories. I believe those dinosaurs who are still around can



Would the next part of the journey be easy? Of course not; if it was, it would not be a challenge. Would there be a feeling of satisfaction if you reached the summit of Mount Everest every day without breaking a sweat?

appreciate the camaraderie that existed on the old proposals that had thousands of pages and hundreds of copies piled so high you made the front pages loading up the trucks delivering them. Overnights were common, and team spirit abounded. Win or lose, you made some lasting friendships.

After I hit the "Send" button, I sat back and anxiously awaited word that my referee had been contacted. This would confirm the process was underway, or so I thought. Instead, I was contacted by APMP at my home email address and informed that emails to my referee were going unanswered. After looking into this dilemma, APMP and I discovered that a firewall at my corporation (from which I had sent the emails) was blocking the emails from APMP in England. Once that was cleared up, my referee did mention being contacted and questioned. The feedback I received was that the questioning was specific rather than general. Keep that in mind when selecting your referees; perhaps giving a home email in addition to an office email would be safe in case your corporation has a similar policy regarding firewalls.

Whew! Miracles do happen, and I was thrilled to receive a telephone call from Cathy Day telling me I had jumped the second hurdle (sleepless nights in the interim) and was now certified as a Proposal Practitioner! What an accomplishment; I felt so elated I wondered if I wanted to go on to even try for the next level—Proposal Professional. I was happy where I was, or was I? Was not that why I had started on this journey in the first place; I was already a Proposal Professional? I had already come two-thirds of the way; how could I stop now? The financial investment notwithstanding, onward I went, tremendously encouraged by Cathy Day, Holly Andrews, and my management.

Would the next part of the journey be easy? Of course not; if it was, it would not be a challenge. Would there be a feeling of satisfaction if you reached the summit of Mount Everest every day without breaking a sweat? Upon reaching the pinnacle, you want to be able to see the trail you climbed and know that you mastered the route each step of the way.

The final great leap to the Proposal Professional plateau consists of having to prepare a Proposal Profession Impact Paper™ (PPIP). The purpose of the PPIP is to establish your firm claim for the significant impact that you have made in the proposal profession. To prepare for PPIP Assessment, you must complete a

Microsoft® PowerPoint® presentation. To understand the level of evidence you are required to show for the PPIP, you can download the PPIP Standards and Guidelines. Again, it is like you are following an RFP. Once completed, you must submit this presentation to the APM Group.

Exhibit 5

Once prepared and submitted, you must participate in a 45-minute panel interview (telephone or face-to-face), where you will present and discuss your PPIP. On the APMP website, there are also "Preparing for the Panel Interview" guidelines to help.

As part of the APMP Professional™ level accreditation process, an independent assessment of our behavior and attitude, particularly in the areas of managing and motivating others to carry out required actions in a proposal environment is required. The assessment comprises a detailed assessment of nine KCAs. Individual competencies within these KCAs are described, and your reference will be asked to rate you based upon pre-defined statements. The questionnaire should not take your reference more than 30 minutes to complete.

Now I had to spend some serious time and consider what, if any, impact had I had or how I had furthered my profession. I reviewed my previous submittal and came up with several ideas. Again, the format for the PPIP was straightforward; once I knew the direction to go in, my presentation flowed.

I was instructed to forward it beforehand to Holly Andrews and Cathy Day, and then wait for a telephone conference with Holly (in California), and Cathy (in England), and me (in New York). What a global experience. Though many, their questions were insightful and thorough, and I was comfortable (no shaking anywhere). It lasted about 45 minutes. No sooner had we hung up than Cathy called back and told me that she had no doubt that I had passed! I felt incredible pride and a wave of ultimate relief. Extreme and utter fulfillment! My celebration was heartfelt, and I still smile when I look at my framed certificates and know what they represent—"I am a Proposal Professional; and I am certified"! My three certificates hang in my office at Northrop Grumman for all to see as they enter. My certification initials follow my name on my emails and business cards. I am proud of these accomplishments, and everyone can see that.

And so, grasshopper, has your journey ended? No sensei, I march on! After being certified and certainly feeling empowered, I started to take a more active role in my local APMP chapter—NY Metro Chapter—and

Somehow, no matter how busy you are, you always find the extra time. I have met impressive colleagues with the NY Metro Chapter, and together we have resurrected this waning chapter.

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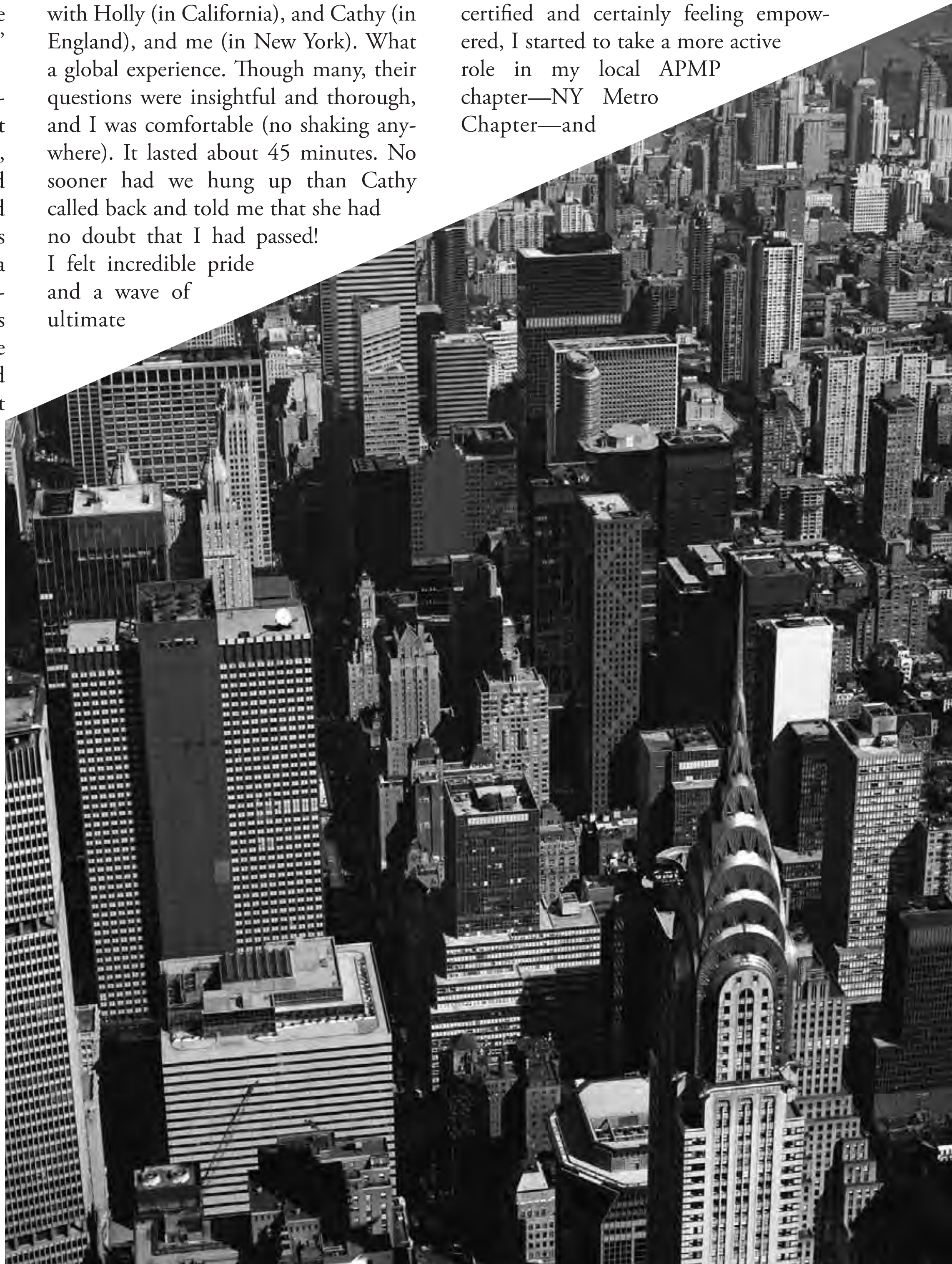


assumed the role of Communications Chairperson. Somehow, no matter how busy you are, you always find the extra time. What a rewarding experience that has been. I have met impressive colleagues with the NY Metro Chapter, and together we have resurrected this waning chapter.

My responsibilities soon grew to oversee the website and the creation and publication of a quarterly newsletter. I had never created anything for the Internet and had never published anything for the web, so I spent many long and difficult hours learning the antiquated web host we had inherited. I learned it was not designed to be a website but rather a blog. After several false starts, we began to move along, and I eventually conquered it sufficiently to allow us to publish frequent updates for our affiliated members.

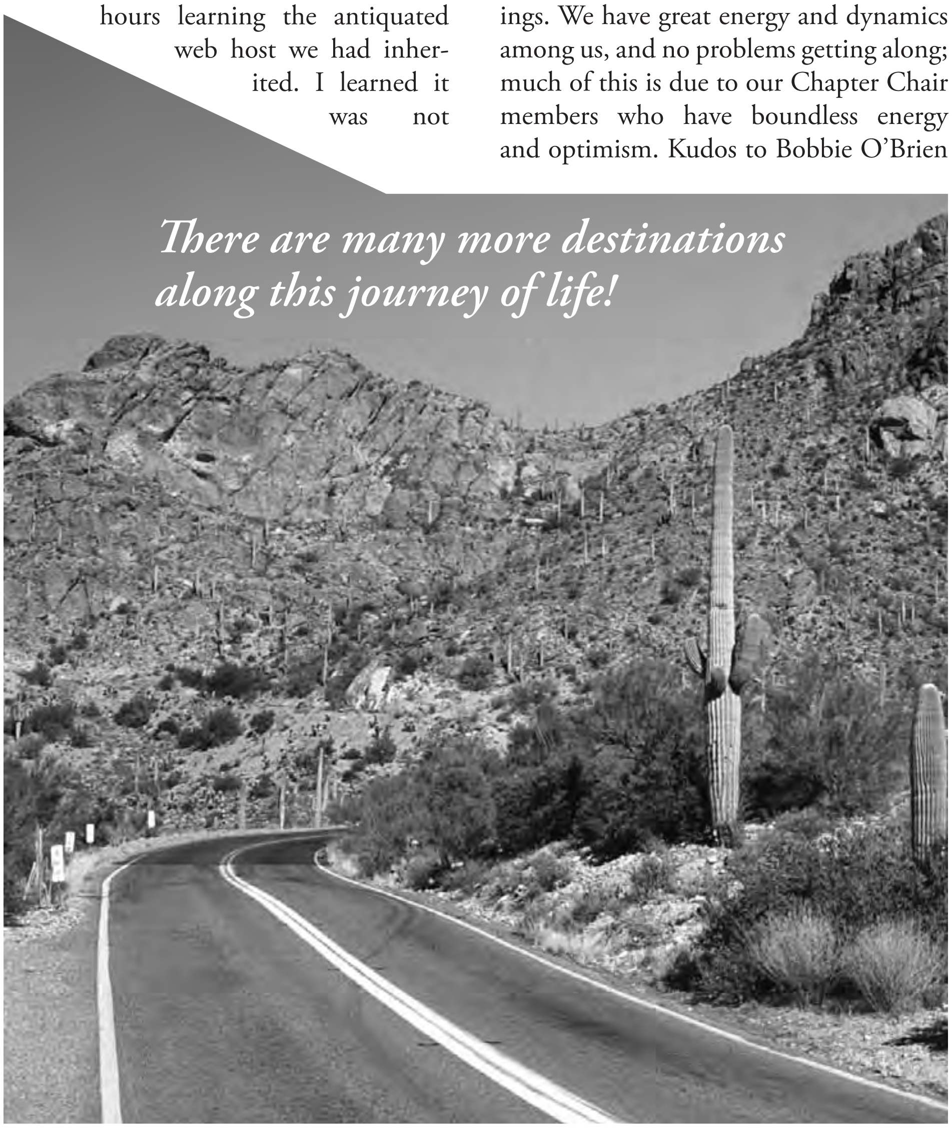
Now, along with a newly energetic board, the NY Metro Chapter reinstituted monthly virtual meetings; we occasionally meet in person. My field of interest grew as other Chapter Chairs broadened my ideas and perspectives. I realized how much more I could learn from those around me. We have had some insightful speakers and interesting monthly Chapter Chair meetings. We have great energy and dynamics among us, and no problems getting along; much of this is due to our Chapter Chair members who have boundless energy and optimism. Kudos to Bobbie O'Brien (who moved up to be APMP's Strategic Initiatives Director and Regional Director [Northeastern US and Canada]), Melissa DeMaio, Laura Higgins, and Philip Bull.

Exhibit 6

But as with some (all?) great plans, ours hit some roadblocks. Just when it seemed we were gliding along, the website malfunctioned, and we were unable to further publish and upload anything. Try as we might, we could never discover anyone we could turn to unlock the site or access the servers and help us with our administrative issues. We finally agreed to move away from that site but discovered additional issues with obtaining our domain name, which leads to a dormant site (www.apmpnymetro.org/). We resolved this issue easier than I would have thought possible. We changed our domain name. Well, we now had a new name on our hat, but just no place to hang it; we were not giving up and will have launched a new Website by the time you read this (www.apmp-nymetro.org). We are very excited about this enormous step forward. There are tremendous resources at our national organization that we are discovering anew each day, and we are taking full advantage of them.

My journey has also seen some tremendous highs. Just when I thought I had reached an all-time high with my success being accredited at the Professional Level**,** I was inducted as a Fellow at our 20th Annual Conference in Phoenix, AZ, in June 2009. To be nominated as an APMP Fellow is a special honor; to be selected is an even greater honor because this is a nomination put forth by our peers. I was truly speechless and felt my knees shaking (this time, my hands did not shake).

This proves to me that just when we think we can do no more, achieve no greater honor, or accomplish nothing else… push on...persevere. There are many more destinations along this journey of life!



Author Bio

Marilyn Moldovan, PPF.APMP, has more than 30 years' experience in proposals. As the Site Administrative Manager for Bethpage, NY, and Hollywood, MD for Northrop Grumman Corporation's Aerospace System's Battle Management and Engagement Systems sector, she oversees those who directly support proposals. Marilyn earned her Master's degree in International Business Administration from C. W. Post and her Bachelor's degree in Business Administration from New York Institute of Technology. She has been a member of APMP since the early 1990s and is the Communications Chairperson of the NY Metro Chapter of APMP. She was inducted by APMP as a Fellow in 2009.

That is the actual question,

is it not amazing how we still refer back to someone's work that died over 400 years ago?

(I doubt this article will have the same effect, but I think it will provoke some questions and some debates, I hope)

to

My question is, should we still be doing it?

In the modern age of technology and progression, do we really need to be talking like we have just swallowed an oxford dictionary along with the whole works of Shakespeare just to compound our perceived intelligence? Whilst I do believe we should always maintain the historical element of our greatest writers… Welles, Byron, DH Lawrence to name a few… and of course we should always encourage reading books no doubt about that… but do we really need to keep referring back to them in our styles of writing and speech? I believe strongly that we should not lose the English language, but perhaps we already have? Especially since the invention of the cellular phone and word processing packages, I, like a lot of individuals, could not be able to function without either of these now and probably would not want to either.

be

Waffling for England—literally

Another striking observation I have noticed recently… Why on earth do so many individuals insist on using this type of "YE OLDE WORLDE" writing in their bid response? Or why do they insist on using it in their day-to-day conversations? Is it necessary? Does it mean I am impressed? I am afraid, alas, I am not. How come these same individuals can make a one-word answer seem like one book out of the trilogy *The Lord of the Rings*? It is an art, I guess. Perhaps after 40 years of bid management, I will aspire to become a waffler (wikipedia definition is great . . .the English version not the food version . . .but they are good with syrup!). With only another 25-ish years to go, I cannot wait.

or

Criterium of the Tenderum

I often look in the evaluation criteria of the bids… and I am puzzled… I have never seen anywhere in the criteria where it states: "to ensure you have gained maximum weighting score for your responses, you must ensure you have included the following:

1. Make all reference to any type of Shakespeare/Latin/Old Norse language (I have Viking in my family way back!) you can find
2. Ensure you have put as many complex narratives in the response—this will make it even more difficult for us to understand and mark.
3. Use abbreviated terminology as much and as often as you can.

We are all guilty to some degree of implementing some of the above due to market sectors we work in. But if there is not an abbreviation already in place for a word, then I am not going to sit and worry about it (I generally have a bid which needs to go out the door!). Anyway, since it is promoting mobile text language, it is a contradiction to me in every way.

not

Benchmark? Or a see-saw of writing styles

More and more companies have "proposal content must be easy to read and navigate" as part of the criteria, but what is that benchmark? I believe the benchmark is if you as the bid manager who is lucky enough to have had a team of SMEs (oops sorry abbreviated term…. Subject Matter Experts) who have written the bid and you are only editing and proof reading the final document. Then you should be able to read it with the 'ease' and be able to 'navigate' from section to section whilst understanding what the key messages are.

to

Put yourself in their shoes/boots/wellingtons—whatever the weather or occasion

Does practicality and common sense ever enter into the equation of bid management and writing styles? I have seen on many occasions unfortunately they do not. I often feel sorry for the evaluators of the bids and believe that if I can just reduce their reading time by a few minutes (whilst capturing the key elements of course!) then surely that has to be a good thing?

Always put yourself in their shoes. If you lose interest after half a page, then you have lost the evaluator. You have more than likely lost the mark, and therefore you have lost overall; the good old domino effect. Why do we over complicate simple things? I have worked in different companies and different sectors and yes they all have their own terminology; however that does not mean we need to over complicate conversations just because we think it may make us sound better to our peers, more often than not, we do not. Does this really make us intelligent writers of the 21st century? I do often wonder.

be…

Using plain English—fighting for crystal-clear communications

I have been a fan of the campaign for plain English for a long time now and on their web site and the first caption which stands out to me, asks the question 'Are you getting through to your customer?'. I fear not, young yorath if it Extract from their web page… "Since 1979, we have been campaigning against gobbledygook, jargon and misleading public information. We have helped many government departments and other official organisations with their documents, reports and publications. We believe that everyone should have access to clear and concise information"

Yes, yes, and yes, please! We always promote using clear, consistent, and compelling responses in our bids. But when it comes down to actually producing it, often we do get carried away. I think sometimes we could put ourselves forward for the booker prize award and probably win it convincingly! Many, many years ago, I, along with another 10 million people, were watching a dating show in the UK. One of the contestance was asked what they did for a living; they replied:

Contestant:
I am a window vision technician

Host of show:
Wow that sounds impressive, do you make high tech windows?

Contestant:
Not quite…I clean windows

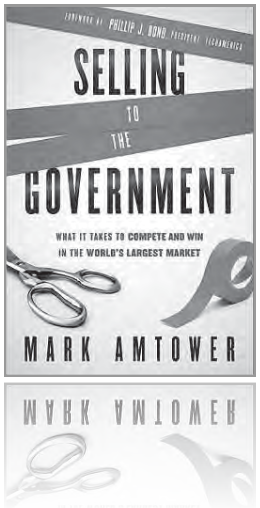
…I rest my case.

A final note…in plain English

"All the world's a stage, and all the men and women merely players: they have their exits and their entrances; and one man in his time plays many parts..."
As You Like It, Act II, Scene 7, 139–42

Author Bio

Amanda Snee, APM.APMP has been working within the bid and proposal management environment for 15 years in various industries and sectors, covering Telecoms, IT, Recruitment and Fire & Security. She is currently working for the UK's largest recruitment company Matchtech Group Plc. She gained her practitioner level in 2010. One of her mottos is "keep your sense of humour even when times are tough and you think you're never going to get that bid out of the door!" She can be contacted on asnee74@hotmail.com.



Selling to the Government: What it Takes to Compete and Win in the World's Largest Market

Mark Amtower

John Wiley and Sons, Inc., 2011

$29.95

by: **Michelle Norman, APF, APMP**

How many times have we read an article or book or attended a presentation or conference and thought, "How do I use this on my job? Where is the practical knowledge? What can I take back to the office to use and share with my associates?" With nearly 30 years' experience in the Federal Government market, Mark Amtower is widely known as a leading authority on federal marketing. He consults with senior management in several companies on government marketing programs.

Mark Amtower's book, *Selling to the Government: What it Takes to Compete and Win in the World's Largest Market* is rich with practical knowledge. The book provides critical marketing information, primarily for business owners, presidents, chief-level executives (C-levels), and board members. However, it also has a wealth of information, resources, and success stories to use and share with both novice and experienced marketers who want to sell to the Federal Government to create, maintain, and grow their market share.

As Mr. Amtower states in the Preface, "This book is the beginning of your journey and is designed to direct you to other valuable resources and alert you to the many things you will encounter along the way..."

The book, only 168 pages long with 12 chapters and 3 useful appendices, is rich in resources. At the end of each chapter, there are "Your To-Do-Lists," which get you started on your journey. However, do not think you can read the "To-Do-Lists" and skip the chapters. If you do, you are going to miss some vital information that can assist you in completing your tasks well. The chapters and appendices are described below:

- Chapter 1, What it Takes to Play, discusses the many things one must know to successfully sell to the Federal Government, such as understanding the Government's infrastructure, the time and resources required, buy-off from senior management, and the importance of establishing many relationships.
- Chapter 2, How the Government Buys, describes the Federal Acquisition Regulation (FAR) and how the Government uses SMARTPay, GSA Schedules, task orders, bids, set asides, blanket purchasing agreements, contract negotiations, and more to buy products and services.
- Chapter 3, Determining Where You Fit, describes how critical it is to understand your niche and how you fit in the Federal Government market.
- Chapter 4, Infrastructure Issues, explains how critical it is to have the appropriate infrastructure (sales and marketing, legal, accounting, personnel, and ethical regulations) in place to successfully do business with the Government.
- Chapter 5, Aligning Marketing Sales, and Business Development, speaks to aligning your business development department (marketing and sales aligned for products and services) with the Government.
- Chapter 6, The Power of Relationships, strongly suggests that the Government is a relationship-driven market and explains how critical manufacture-to-distributor, prime-to-sub, company-to-media, peer-to-peer, and social networks are when doing business with the Government.
- Chapter 7, The Myth of the Level Playing Field, discusses the myth of the "Level Playing Field." Mr. Amtower explains this is where you bring your research intelligence and networking relationships together to execute your plan.

> *"Let it be your step-by-step guide to successfully sell to the Federal Government."*

"I suggest that companies wanting to sell or expand their business with the Federal Government make this book required reading for their business development and proposal professionals."

- Chapter 8, Differentiation is the Key, helps companies identify their differentiator and how they should define, claim, and defend their intellectual real estate (education, engagements, press quotes, articles) and incorporate their niche ownership into all collateral material.
- Chapter 9, Execution, focuses on expertly completing the immediate task, using the right skills and assets you have to work with, especially physical or intellectual property.
- Chapter 10, Building Momentum, describes how companies can expand incrementally, evolve, and grow their niche.
- Chapter 11, The Missing Link, describes how to use Web 2.0, a set of tools that allow companies to interact (social networks, twitter, podcast, webinars, distance learning, web radio, wikis, blogs, and video).
- Chapter 12, Final Thoughts on Staying on Top of the Game and Becoming a Government Market Master, offers Mr. Amtower's "words of wisdom."
- Appendix 1, Glossary of Common Government Terms, "gov-speak"
- Appendix 2, Resources, Publications, and Associations, that serve the market
- Appendix 3, Advice from Industry Experts

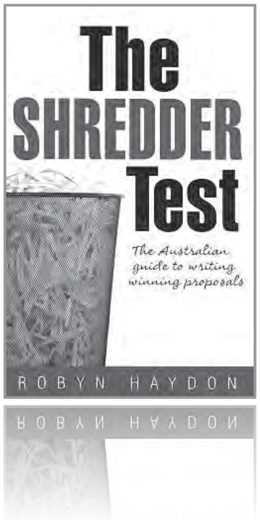
I do not merely recommend reading *Selling To The Government: What it Takes to Compete and Win in the World's Largest Market*. I suggest that companies wanting to sell or expand their business with the Federal Government make this book required reading for their business development and proposal professionals. Do not just buy the book and say, "read it." Ensure that your colleagues are part of that "one percent of the people out there [who] wish to excel at what they do and read professional books, journals, and trade publications; join pertinent groups; attend seminars and webinars; and find multiple ways to share and grow." For example, you can schedule several staff meetings or luncheons (call them Lunch-n-Learn sessions). At each session, methodically review and discuss each chapter to understand what it takes to succeed in this market—kick the tires and muck around in the engine—so to speak. Navigate through the many websites Mr. Amtower recommends; Google some of the masters currently doing business with the Federal Government and learn more; listen to Mr. Amtower and other experts on federal web broadcast stations:

- http://federalnewsradio.com
- http://gov20radio.com

and begin or extend your journey into the government market.

This book is relatively short and should be an easy read for most. However, it took me forever to finish it, because I was so engrossed in the practical material. As Mr. Amtower introduced success stories, government and industry websites, federal talk radio stations, and social networking websites, I felt obligated to go online to research and learn more. Then I wanted to share my new knowledge with anyone who would listen (associates, friends, and my poor husband), so I sent emails. Well, we know how much time that can take. I strongly recommend you do not buy *Selling to the Government: What it Takes to Compete and Win in the World's Largest Market* and just put it in your proposal library. Buy it, read it, and let it be your step-by-step guide to successfully sell to the Federal Government.

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



The Shredder Test: The Australian Guide to Writing Winning Proposals

By Robyn Haydon

2007

http://www.winningwords.com.au/

$37.00

by: **Sarah Taurchini**

Do not let the title fool you. *The Shredder Test* has absolutely nothing to do with a paper shredder! "Shredder" is a helpful acronym to remind you what to do (and what not to do) when writing a proposal. As Robin Haydon states in the first page of her introduction, "A good proposal is a difficult document to write. And for the most part, we are not taught how to write proposals—we learn by trial and error—often the hard way." Proposal writing is central to most businesses, but students only learn how to write theses—if they learn how to write at all! How else can one learn to write a proposal except by trial and error, a method generally not associated with good business practice? This book is geared towards people who are new to writing proposals or who may wear many hats in their organizations and are looking to improve their skills. Haydon is an Australian and is one of the first Australians published on the topic of proposals. Much of the advice she shares, however, is not limited to the land "down under" but is applicable to all variations of proposal writing—commercial, grant writing, and even United States (US) Federal Government proposals.

From the table of contents, Haydon follows her own advice. Beautiful in its simplicity, the table of contents provides chapter titles (each corresponding to the appropriate letter in the word "shredder") and a subtitle with the writing point to remember. The first chapter, dedicated to "signs" (the first "s" in "shredder") that a prospect is ready to buy, may seem to state the obvious, but the chapter details how to know when presenting a proposal is beneficial rather than detrimental to the sales process as some proposals can be submitted too early. Haydon claims, "A true proposal—something with a price on it—only works when it confirms how you will work with or supply to the prospect. If you are still talking about why, the time isn't right." A proposal, she argues, for those commercial or unsolicited bids should actually come later in the selling process—in Haydon's scheme it is step 5 of 7. A proposal should not be offered until you can convince the buyer that they have a problem your offer can solve. Obvious? Maybe. As writing proposals can be intimidating, it is a helpful reminder to start the book off with the simple test of whether to create a proposal, to simply send in a price quote, or to not bid at all. US-based literature on the definition of proposals often reflects the concept of proposal primarily as marketing document; it is interesting that Haydon defines a proposal as anything "with a price on it."

The second chapter is H for "half-baked," but is better explained by the subtitle "the pitfalls of cutting corners." This chapter helps determine how long a proposal should be, when not prescribed for us, and how to balance the different types of information one needs in the proposal based on what you are selling. It also offers the "White Pebbles Proposal Building Method"—a step-by-step approach—though the chapter also warns that pure-template proposals should be avoided, especially for complex sales.

"US-based literature on the definition of proposals often reflects the concept of proposal primarily as marketing document; Haydon defines a proposal as anything "with a price on it.""

> *"This book is geared towards people who are new to writing proposals or who may wear many hats in their organizations and are looking to improve their skills."*

The third chapter discusses the seven sins of "readability," of which the most directly applicable aspect is the checklist at the end of the chapter that provides the seven do's and don'ts of readability. Every chapter in *The Shredder Test* includes a useful checklist at the end of the chapter—great references to use during the actual proposal-writing phase. Chapter four is dedicated to "Expertise" and proving to your customer that you actually have some expertise in what you are selling. Haydon recommends using case studies and testimonials to prove to your potential customer that others have already used your product or service and have considered it a good investment rather than attacking or degrading your competition directly.

The first D in *The Shredder Test* stands for "Desirability," and the chapter is further divided into three main points: 1) "the 'offer' is more than just the price," 2)"the purchaser's predetermined evaluation criteria will help to frame the offer," and 3) "Purchaser Value Topics can also help build a logical and consistent pattern of arguments within a proposal." The second D is for "Decision Makers"—another seemingly obvious concern while formulating a proposal, but one that we all often forget when writing. This chapter is dedicated to confirming you pitch your proposal to the right person, in the right way. The two "D's" are combined at the end of the chapter with the "influencer chart"—examples on how to determine which Purchaser Value Topics will appeal to people in specific positions that can influence the probability of a purchase.

The final two chapters, E for "Elimination Traps" and R for "Review," help ensure your proposal addresses all the potential issues and concerns your client is expecting answered. "Elimination Traps" refer to making the shortlist—the "maybe" group instead of the "no" group, as there is no initial "yes" group in many sales situations. "Review" reminds us to edit and work with constructive criticism. This chapter additionally includes self-test proposal checklists and encourages every writer to solicit and consider feedback when proposals are not won, as it is the only way to get better!

The Shredder Test is a good, basic primer for creating winning proposal documents or improving your existing proposal writing abilities. It was refreshing to see similar advice and concerns in Australia that we share in the United States. Major differences only appear in word choice, with a few "blokes" or other colloquialisms thrown in and some slightly different definitions or descriptions for commonly known ideas ("white pebbles" versus "breadcrumbs;" "pet hate" versus "pet peeve;" the use of "tender" and "proposal" interchangeably). The book is more applicable worldwide for companies bidding in open business-to-business environments than in the strictly defined world of US Federal Government proposals, although federal proposal writers can always pick up a few tips from this straightforward and easy to read book.

Sarah Taurchini works at the 24 Hour Company in Falls Church, VA. She graduated from Georgetown University and reads a great deal in her albeit limited spare time. She is a Helen Hayes award-winning actress and regularly performs in the Washington, DC metro area.

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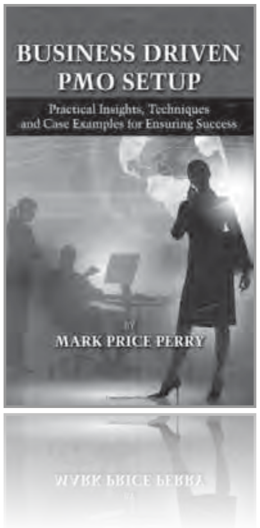

Business Driven PMO Setup: Practical Insights, Techniques and Case Examples for Ensuring Success

Mark Price Perry

J. Ross Publishing

$76.44

by: **Jim Hiles**

Mark Perry sets the stage for his volume on Business Driven Project Management Offices (PMOs) by highlighting the difficulties associated with getting a PMO started and keeping it on track. Proclaiming that the majority of volumes on the subject are recitations of standards and academic discourses, he cuts to one of his main points on the first page with the opinion that "blindly pursuing and adopting academic and theoretical approaches and models as opposed to practical business strategies tempered with good business, technology, and financial judgment is perhaps the greatest single reason for the poor track record of PMOs." As a frequent reviewer of proposals, this opening volley struck a chord with me: I have read many proposals that match this description of over-application and rigid adherence to models and standards that are not tempered with the needs of the specific use, application, or environment.

Business-driven PMO Setup provides managers and practitioners with real-world practical advice on how to achieve PMO success. A primary thought is that PMOs are ubiquitous, and that we are all better served by recognizing and acting on this fact. Numerous examples provided throughout the book reinforce this point, including a chapter devoted to the subject. The author titles this chapter "Line of Business PMOs" to distinguish these types of PMOs from those associated with a specific project.

The author makes repeated use of an effective way to organize his writing. He starts by stating the conventional view by quoting a specific project management advice provider, and then provides reasons backed by logic for why a contrarian viewpoint is needed. In the case of line-of-business PMOs, for example, the conventional view is that such PMOs are cost centers that do not directly generate revenue for an organization and exist to improve project management. The contrarian view is then eloquently captured in a cartoon dialogue:

Sales & Marketing Figure: "Do you have anything in your PMO that we in sales and marketing can use to help us better manage all of our departmental projects?"

PMO Figure: "You mean those informal projects?"

Sales & Marketing Figure: "Yes, those informal projects we do to sell our informal customers, to make our informal quotas, to ensure the informal success of our company."

This book is very appropriate to its audience, although it is written in a style that is not necessarily well-suited to the active manager's time and attention span. Mark Perry provides excellent insight and practical examples for all of his points, and offers a balanced critique of what others have to say, and what is frequently taken for granted about a particular aspect of PMOs. The chapters all follow a similar pattern: focused insights are followed by a comic and graphics that help the reader intuitively understand the main points, and each chapter and section ends with a concise summary. However, intervening pages are at times lengthy and approach the subject in a round-about fashion that forced this reader to refer back to section headings for reminders on how the narrative fit in the section or chapter and what the last milestone was on the journey to a better depth of PMO understanding.

A wide variety of sources are cited throughout the book, with references listed at the end of each chapter. Although this reader would have preferred a complete reference listing at the end of the book so the entire list could be taken in as a whole, the range and depth of included references did indicate how thoroughly the author's research supports his points. Each chapter also includes questions that

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> "There have been hundreds of books published on the subject of PMOs and operations in the last decade. Mark Perry brings a needed synthesis and balanced business-based perspective to this genre."

are well-suited for instructional purposes and support self-reflection on the preceding chapter.

As indicated by the stylized exchange between sales and marketing and the PMO cited above, the author's central bias appears to be a view that the PMO landscape as "us versus them," where rigid PMO template promoters lurk behind every project or undertaking, waiting to sap the time, talent, and energy of those interested in accomplishing purposeful business objectives. The author does not overstress this, however, and does present a balanced view that fully attributes all sources and provides point/counterpoint examples and arguments.

Each chapter is followed by an executive insights section. Written by some 20 contributing authors, these sections put the lessons and points raised in the preceding chapter into an illustrative, real-world example. The author's viewpoints are clearly identified; many chapter subtitles portray a spectrum of possibilities, with the author's favored side of the spectrum presented first. Some of these titles and subtitles which most clearly present the book's main themes are:

- Mission, goals, and objectives: Business driven versus theory driven
- Organization: Constituent oriented versus inwardly focused
- Managing projects: Think process not methodology
- Managing the PMO: Embracing flexibility versus mandating conformance
- Executive reporting: Keep it simple
- Project management leadership; Servant leader versus subject matter expert

One of the later chapters is an excellent summary of how to create and manage high performance teams. This is a brief and very well written chapter that synthesizes leading thoughts on the subject.

Throughout the book, the author's goal is to help the reader transcend looking at PMOs as project-specific. His overarching discussion on high performance teams reminds the reader where an organization can go if it follows business driven PMO setup principles.

There have been hundreds of books published on the subject of PMOs and operations in the last decade. Mark Perry brings a needed synthesis and balanced business-based perspective to this genre. A recognized expert in this field, Mark Perry is the founder of BOT International (www.botinternational.com) a provider of productized offerings for PMO content assets. Mr. Perry had a 17-year career with IBM and is a veteran of several Pacific rim software solutions providers. He has PMO experience across a wide variety of industries and markets, and is conversant in Japanese, German, French, and Spanish. He has published a number of podcasts and blogs, and has authored two PMO books: *Business Driven PMO Setup* reviewed here and a 2011 volume titled "*Business Driven Project Portfolio Management; Conquering the Top 10 Risks that Threaten Success.*"

As a frequent reviewer of proposals, I was drawn to *Business Driven PMO* Setup in my search for better answers and explanations on "how we do it"—how a firm can or should be providing services and solutions, and on the reasons behind the "how we do it" explanations often encountered in proposals. Mark Perry's book weighs in at 494 pages and is not a single-afternoon read. It is, however, an excellent and highly recommended book to gain deeper understanding and practical application advice on PMOs, on project and program management, and on creating and maintaining high performance groups and organizations.

Jim Hiles is an avid consumer of business development-related books and materials. He is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the Federal Government. Jim manages Public Sector Business Development for the MorganFranklin Corporation and is The APMP *Journal* Book Review Editor.


You hate second place?
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The Cloud at Your Service:
The When, How, and Why of Enterprise Cloud Computing

Jothy Rosenberg and Arthur Mateos

Manning Publications, 2011

$19.79

by: **Jim Hiles**

IT-related business developers and proposal professionals must understand the concepts, applications, and business cases for cloud computing. The tremendous potential of cloud computing has become a persistent presence in technology solutions, value propositions, and proposals. Cloud concepts may not be in your proposals yet, but it is likely they are already in your competitor's proposals. A basic understanding of what they are and how they can benefit your customers is therefore imperative.

"What is the cloud?" generates more than 13,000,000 worldwide searches on Google a month. yet the much-hyped terms "cloud" and "cloud computing" remain inexplicable to many. While few would dispute that the existence and proliferation of cloud computing capabilities mark a waypoint in how companies evaluate and buy new technology, these capabilities are not easy to understand, nor is it always clear what people are referring to when they speak of the cloud and cloud computing. Books, blogs, and articles are prolific on the topic, are difficult to decipher, and are filled with biases based primarily on the promotion of specific vendor solutions and technologies.

Authors Jothy Rosenberg and Arthur Mateos directly confront the current hype-storm and present a timely and easily read volume on what the cloud is. Their stated goal is to talk directly to organizations about how to undertake the shift to cloud computing and what this will mean to those organizations and their information technology stewards and business decisions, and how to proceed in a "sane and reasonable manner."

The authors define cloud computing as computing services offered by a third party, available for use when needed, that can be scaled dynamically in response to changing needs. This definition is further illuminated by the five main principles/components that the authors contend must be present to call something cloud computing:

- Pooled computing resources available to any subscribing users
- Virtualized computing resources to maximize hardware utilization
- Elastic scaling up or down according to need
- Automated creation of new virtual machines or deletion of existing ones
- Resource usage billed only as used

At 244 pages, *The Cloud at Your Service* is not overly lengthy. A number of illustrations throughout the book do an excellent job in helping the reader understand main ideas in the text. For this reader the chapter with the biggest impact, Chapter 1, is only 17 pages, yet it answers the question "what is cloud computing?" In addition to the definition and five principles/components, the chapter includes graphics that cleanly illustrate the exponential growth of cloud services, a complete taxonomy of the cloud vendor base, and a breakdown of the categories of provided services.

The remaining eight chapters cover cloud computing classifications; the business case for cloud computing; security and the private cloud; designing and architecting for cloud scale; achieving high reliability at cloud scale; testing, deployment and operations in the cloud; practical considerations; and the future of the cloud. The chapter on cloud computing classifications includes a section on the technological underpinnings of cloud computing. This chapter is particularly enlightening, as it puts the scale of infrastructure behind the public cloud into perspective. Massive data centers exist and are being expanded to provide the scale needed to meet cloud computing demands and achieve economies of scale. Data center power consumption across the US currently represents 1.2 percent of total power consumption in the country, and is increasing as a percentage of the total. Large public cloud providers are household names: Google, Microsoft, and Amazon. These companies have data centers as large as 10 football fields filled with tractor-trailer sized containers full of servers for data storage. Why and where current data centers are located, how they are evolving, and how they are used is presented in an understandable, clear manner.

The authors both have technical backgrounds and careers that include entrepreneurial activities. Jothy Rosenberg

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holds a Ph.D. in computer science and has founded six companies. He has written two previous technical books and holds several patents.

Arthur Mateos was an experimental nuclear physicist who became a technology entrepreneur. He has a patent awarded on content distribution technology, a bachelor's degree in physics from Princeton University, and a Ph.D. in nuclear physics from MIT. Authors with such backgrounds might have created dense text and concepts difficult for the lay reader to understand. However, this is not the case with *The Cloud at Your Service*. The chapters are well organized and presented in plain language, and biases for dominant vendors are not present. The authors' ability to translate complex topics into easily understood explanations is shown by the book's information security appendix—six crisp pages that quickly and comprehensively summarize the main components of information security and help readers understand security in the cloud. Security components covered in this appendix include shared and public key cryptography, XML signatures, and encryption.

The authors close with a chapter devoted to the future of the cloud where they make 10 predictions about how the cloud will evolve, and 10 predictions about how application development will evolve. Their predictions are well-reasoned and supported by evidence: actions and activities currently underway in the use and adoption of cloud computing. IT business developers and proposal professionals can benefit greatly by reviewing the many interesting and illuminating ideas and concepts in this chapter, including how and why the authors predict that the government will lead enterprises in cloud adoption.

One additional note: author Jothy Rosenberg is a cancer survivor who has lost appendages and organs to the disease. His very inspirational life story (provided in more detail on his Amazon author's page) reminds us of the power of the human spirit to overcome adversity. Portions of the proceeds from *The Cloud at your Service* will be given to the O'Brien Fund for Osteosarcoma research at the Dana-Farber Cancer Institute.

> "Data center power consumption across the US currently represents 1.2 percent of total power consumption in the country, and is increasing as a percentage of the total."

Jim Hiles is an avid consumer of business development-related books and materials. He is an independent thinker with deep experience in the buying and selling of goods and services, predominantly by the Federal Government. Jim manages Public Sector Business Development for the MorganFranklin Corporation and is The APMP *Journal* Book Review Editor.

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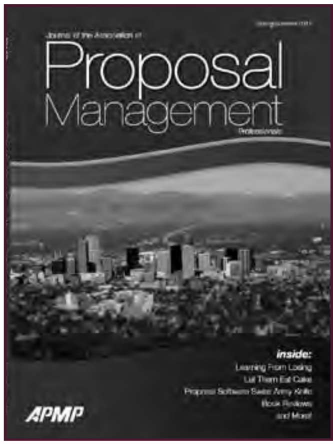

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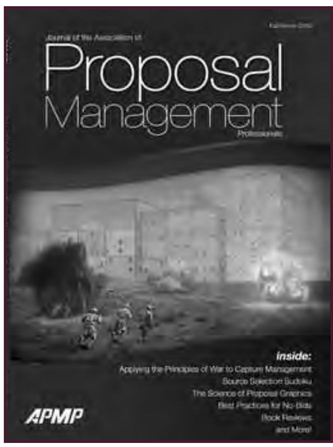

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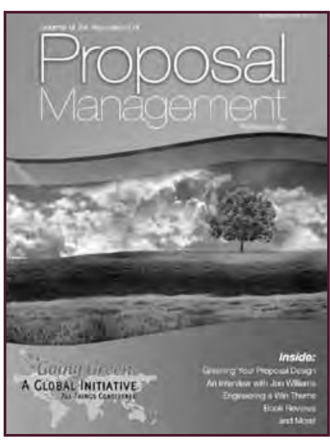

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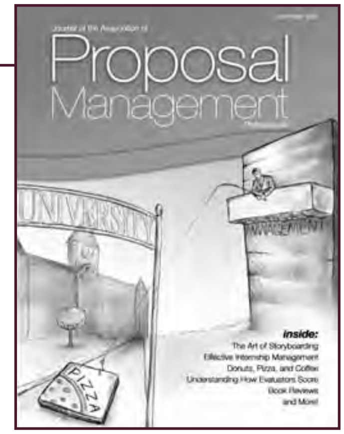

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