Association Spotlight

Winning and Living – Achieving the Balance

…the theme for the 2005 APMP Annual Conference. We all know and understand the importance of winning work, but often we forget that in order to perform, we must allow ourselves to live. This requires balance. The 2005 Annual Conference is packed full of presentations that not only will help us with our work, but also help us to balance life and work. The conference will offer a variety of presentations, from case studies, lessons learned, and approaches to several presentations on ***Living*** – managing stress, managing time, and improving communications.

We are pleased to have Dr. Tom Barrett as our keynote speaker this year. Dr. Barrett is the author of ***Walking the Tightrope – Balancing Family Life and Professional Life***, which offers tools for leaders attempting to navigate the tightrope between life and career. He also specializes in understanding the unique pressures faced by those in political life and has spent over 10,000 hours working one-on-one with Senators and Congressmen on Capitol Hill. He is one of the few individuals ever asked to speak at the orientations for *both* political parties in the United States Congress.

The location itself is a feature presentation. The Sheraton Wild Horse Pass Resort is located on the Gila River Indian Community. This ancient Indian land is home to 1,500 wild horses that still roam freely today (if you watch closely, you might just glimpse a herd thundering across the desert). The unique resort is the result of a collaboration between Starwood's Sheraton brand and the Maricopa and Pima Indian Tribes. The art, architecture, and design of the resort celebrate these two tribes who continue to offer hospitality and welcome us to their resort, just as they did for the settlers heading to California during the Gold Rush and the U.S. Military.

Leveraging on our theme of ***Living***, we will be hosting an opening reception on Tuesday evening, June 7, with a special welcoming ceremony from Tim Terry Jr. Mr.Terry is a traditional counselor for the Gila River Indian Community. This welcoming ceremony will provide some of the history of the tribes and the resort, as well as some of their own issues balancing new and old. We invite you and your family to participate in this unique, traditional opening ceremony, offering all an opportunity to learn about our hosts.

We have made some modifications to the conference format, as well. Based on feedback from our membership, we are modifying the lunch hours to focus on networking. We also have a variety of workshops available for participants, including leadership and writing skills. Wordman returns on Friday with his Wordman Q&A. And for those who want to improve their Microsoft Word skills, there will be a hands-on workshop to provide some techniques for managing and publishing documents.

On behalf of your conference hosts, we hope you will take full advantage of both the conference offerings and the relaxed atmosphere of our beautiful surroundings in Phoenix, home of the APMP 2005 Annual Conference.

–Kirste Webb

Proposal Management

Cover Art by Chris Prochaska, 24 Hour Company
Graphics by 24 Hour Company

The Journal of the Association of Proposal Management Professionals

IN THIS ISSUE

JOURNAL**STAFF**

ProposalManagement • *The Journal of the Association of Proposal Management Professionals*

Elder

Managing Editor
John Elder
CACI International, Inc.
1100 North Glebe Road
Arlington, VA 22201
jelder@caci.com
Voice: (703) 841-7809
Fax: (703) 528-7232

Assistant Editor
Lori Granger
Founder
Frosty's Corner, LLC
6108 Cloud Drive
Springfield, VA 22150
redteam@frostyscorner.com
Voice: (703) 924-3062

Granger

Sokolow

Assistant Managing Editor & Editorial Advisory Board Chair
Dr. Jayme A. Sokolow
The Development Source
4312 Garrett Park Road
Silver Spring, MD 20906
jsoko12481@aol.com
Voice: (301) 933-3989
Fax: (301) 946-5907

Book Composition & Cover Design
Colleen Jolly
24 Hour Company
6521 Arlington Boulevard, Suite 501
Falls Church, VA 22042
colleen@24hrco.com
Voice: (703) 533-7209
Fax: (703) 533-3959

Jolly

Mitchell

Senior Editor
Linda Mitchell
Proposal Manager
Datatrac Information Systems
14120 Newbrook Drive, Suite 200
Chantilly, VA 20151
L.Mitchell@datatrac-dc.com
Voice: (703) 817-9700 x 4208
Fax: (703) 817-9791

Editorial Advisory Board Members
(Contributors, Spring/Summer 2005,
in Alphabetical Order)

Tod Allan	Hamby Groover
Phil Egert	Johanna Purvis
Robert Frey	Kate Rosengreen
Linda Greenwell	Reba Shoulders

Rider

Articles Editor
Rick Rider
Rick Rider Resources
8404 Beech Tree Road
Bethesda, MD 20817
riderr@erols.com
Voice: (301) 365-0839
Fax: (301) 365-2132

Advertising, Subscriptions, & Information
David Winton
APMP Executive Director
P.O. Box 668
Dana Point, CA 92629
apmpinfo@aol.com
Voice: (949) 493-9398
Fax: (949) 240-4844

Paskun

Books Editor
Ali Paskun
Lead Proposal Manager
Technical and Management
Services Corporation (TAMSCO)
4041 Powder Mill Road, Suite 700
Calverton, MD 20705
apaskun@tamsco.com
Voice: (301) 595-0710
Fax: (301) 595-0790

The cover of the previous edition of the Journal was designed by Chris Mahon, 24 Hour Company.

CHANGES OF ADDRESS AND CORRESPONDENCE:

Members of APMP should send notification of change of address via e-mail to b.n.fields@worldnet.att.net or by mail to: APMP; 300 Smelter Ave. NE #1; PMB 383; Great Falls, MT, 59404.

Any change in correspondence relating to non-member subscriptions should be sent to the same address. Subscription 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:

Rates effective for 2005 *APMP Professional Journal.*

Rates per Issue:

Premium Placement Locations*

Back Cover: $1800.00 (4 Color) *(Sold for 2005 issues)*

Inside Front Cover: $1700.00 (4 Color) *(Sold for 2005 issues)*

Inside Back Cover: $1700.00 (4 Color) *(Sold for 2005 issues)*

All Other Placement Locations*

Full Page: $1500.00 (4 Color)

Full Page: $1300.00 (B&W)

Half Page: $1000.00 (B&W)

*15% discount for all contracts of three or more consecutive issues. Payment in advance required. Rates are subject to change for issues published after December 31, 2005.

Schedule:

- Ad commitment (50% minimum, deposit required)—due February 8th (for Spring), or August 17th (for Fall).
- Electronic copy—Due March 4th (for Spring), or September 21st (for Fall).
- Final payment due to APMP—March 4th (for Spring), or September 21st (for Fall).

To Secure Advertising Space:

Please contact John Elder at (703) 841-7809 or e-mail: jelder@caci.com.

Advertising Format and Guidelines:

Submit all artwork electronically as CMYK or Grayscale 300 dpi .tiff, .pdf, .eps, .ai, or .psd files on CD-ROM including all necessary fonts. Full bleeds for both color and B&W are necessary. For technical assistance please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

Please visit the APMP Home Page at www.apmp.org for additional information about *The APMP Professional Journal*, including viewable PDF files of advertisements and articles.

MEMBERSHIP:

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.

Our annual membership fee is $95. APMP's Federal Tax I.D. Number is 87-0469987. You may obtain a membership form in Adobe Acrobat/PDF format from the APMP Website, www.apmp.org. Send your completed membership form to: APMP, Attn: Membership Applications, P.O. Box 668, Dana Point, CA 92629-0668. (949) 493-9398, (949) 240-4844 fax.

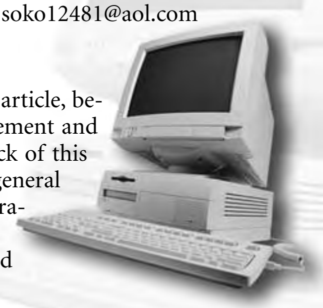
Invitation to Writers

Now you can share your expertise and experience in a worldwide forum of business development acquisition and proposal management colleagues and peers. Gain visibility. Demonstrate your successes. State your opinions or air your complaints. 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.

Typical Schedule	*Spring/Summer Issue*	*Fall/Winter Issue*
Concept Approval	Late October	Late April
Summary & Outline Due	Mid-November	Mid-May
Article First Draft Due	Late December	Late June
Article Final Draft Due	Late January	Late July
Peer Review & Updates	Late March	Late September
Print & Distribute	June	December

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. FOR MORE INFORMATION or to plan your contribution, call or e-mail us.

John Elder	Jayme Sokolow
Managing Editor	Assistant Managing Editor
(703) 841-7809	(301) 933-3989
e-mail: jelder@caci.com	e-mail: jsoko12481@aol.com



If you consider submitting an article, begin by reading the Editorial Statement and Guidelines for Authors at the back of this issue. There you will find our general guidance on manuscript preparation, scope of content, style, and methodology for submission and review.

In our next issue…

…we will be recounting the history of APMP…from its inception in June, 1989 through this year's Annual Conference. It should be a fun look back for those who have been with us from the beginning and provide interesting insight to our newer members.

We want to ensure that all of the highlights are included. If you have photographs, artifacts, or interesting stories to share from past conferences, symposia, your local chapters, or other APMP activities, please contact either:

John Elder: jelder@caci.com or **Ali Paskun:** apaskun@tamsco.com

The deadline for submission of material is August 31, 2005.

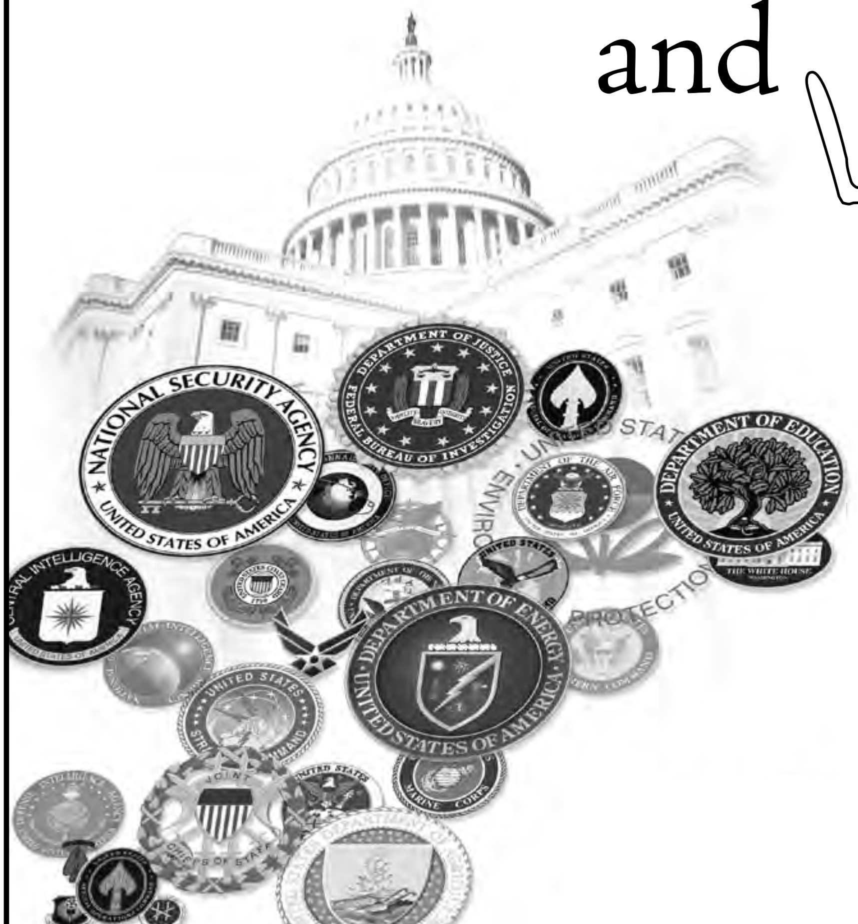
See you at the Conference!

John

APMP Conference June 7-10th,
Sheraton Wild Horse Pass, Phoenix, Arizona

Article

The Difference Between WINNING and LOSING Capture Efforts



by Jay Herther

The differences between winning and losing proposals are often deeply rooted in capture efforts. I am presenting information that should help you win a higher percentage of the proposals you prepare, and, just as importantly, allow you to better understand why you may have lost bids in the past.

For example, you will learn:

- Why it is so important to develop a Capture Plan and designate a Capture Team
- Why some proposal teams get stuck in the bid/no-bid caution mode, a sure recipe for disaster
- Why, despite the common perception, you should always write an Executive Summary first
- Why you should avoid any writing before setting a technical and management baseline
- The five cardinal rules to stay out of the Loss column and in the Win.

Two specific case studies are presented in an effort to analyze important process and approach differences between winning and losing capture team efforts. The cases detail process and capture team actions during the phases of the Capture Management Life Cycle [Garrett, 2003]. The Life Cycle model has three phases and ten stages, as shown in Figure 1. This model provides an appropriate framework for describing these actual case studies (the company, customers, and proposal names are omitted to protect proprietary and competition-sensitive information).

Figure 1 – The Capture Management Life Cycle has 3 phases and 10 stages. It provides a solid framework for our real-world case study analysis [Garrett, 2003].

These case studies will resonate with capture efforts in your own organization. When you are immersed in a capture battle, it is often difficult to see the flaws that will be identified in the losing case. When you are on a winning capture team, the process will resonate and you will be able to amplify the right process steps and add to your team's effectiveness. Lessons learned are presented and five cardinal rules are provided to significantly improve your win rate.

Case Study of a Win

This following case study is based on a Request for Proposal (RFP) for a sophisticated communications system. The scope of work of this program included providing the equipment and technical services for a large government agency. There were three qualified bidders. We were the number three company in this market segment.

As you read this winning case study, notice the key elements of the Pre-Bid phase, such as clear and resounding "Bid" decision, and the development of a Capture plan.

Pre-Bid Phase – for a Win

As expected, this opportunity was judged so important to the future of our company that it had been designated a key opportunity in our three-year Strategic Plan. The primary sales person assigned to this opportunity was known within the company for his ability to focus with laser-beam intensity on jobs assigned to him. He met with the customer many times prior to the writing of the RFP. He knew the programmatic, fiscal, and technical buyers. Importantly, he understood the backgrounds of key decision makers and evaluators well, and how they would reasonably gain a "personal win" [Miller Heiman, 1998] with the successful award of this contract.

Our sales person developed a relationship based on trust and fulfilling promises. He fostered an internal customer champion by genuinely listening and being responsive to requests. When he met with the customer, it was never a monologue; rather it was an interactive dialogue. Sometimes he presented briefings, but more often he simply asked questions to understand the customer's underlying needs and implicit (verbal

only) requirements. Although our company's salesperson was the single point of contact for this particular customer, he was also a team player who brought our solution architect and product manager along for discussions at several meetings. After all, the capture process is a multi-functional team activity, particularly in large and complex system efforts. There are multiple sell points and a range of customer requirements, hopes, fears, and biases. While the single customer interface is the primary sales person, capture teams require a multi-dimensional customer interface.

Our company's solution architect provided his technical customer counterpart and consultant with an early guide, form specification, and technical description document. These helped the customer prepare the draft RFP for industry comments. In fact, when drafting the final RFP, the internal champion called his contacts in our company several times to make sure that the product could comply with certain specifications. The customer, in effect, became instrumental in the system design approach. The company contacts involved her in the process and shared their design concepts, and she recommended several changes based on her preferences.

...the capture process is a multi-functional team activity.

Our primary sales person had provided a Rough Order of Magnitude (ROM) price early in the pre-bid phase before the issuance of the final RFP. The customer, in turn, used the ROM to develop her budget. Our sales person also discussed cost trade-offs with the customer and obtained a fact-based understanding of the customer's budget for both near-term profile and out-year funding. This budgetary insight proved invaluable when calculating the Price-to-Win (PTW). All team members collaborated on the win strategy. After an afternoon of off-site brainstorming, they each drafted a central win strategy statement. The capture team leader integrated all statements into a win strategy so concise and succinct that it was captured on the back of a business card.

The team was highly motivated with a passionate desire to win.

As you read this winning case study, notice how some of the key elements of the Bid phase such as developing the solution and conducting Red Team reviews are highlighted.

Bid Phase – for a Win

Since this large contract had been designated a key opportunity, the General Manager immediately assigned the person he judged to be the best capture team leader. This capture team leader was not available when the RFP arrived (if he had been, he may not have been the right choice) because he was working on another important project. However, convinced of his initial judgment, the General Manager re-assigned this person full-time to lead the higher priority opportunity. This capture team leader handpicked his team and colocated them in a common area to ensure working in close proximity. This approach facilitated communication and idea sharing, and proved an effective way to keep proposal information secure.

The team kept the key proposal data (e.g., win strategy, win keys, executive summary, technical baseline diagram, proposal milestone schedule, and storyboards by section) posted, literally, on the proposal room wall. By keeping the information in such a prominent position, everyone had access and the capture team management had real-time visibility into proposal status. Although the strategic partners/subcontractors on the team were in geographically disparate locations across the country, they were intimately involved via weekly virtual team meetings through conference calls and net-meetings. The team also used an on-line, secure, document-sharing Website. There was no need for a bid decision, since the company had made the decision many months earlier.

Parts of the RFP were a bit contradictory and confusing, but because of his familiarity with the project, the primary sales person was able to clarify and determine percent weightings of importance for the Section M evaluation criteria (often Section M criteria has an algebraic determination of the relative weightings, and customer knowledge is needed to estimate the individual criteria's

percentages). The team used Section M to validate and update the win strategy. The sales person then briefed everyone on this win strategy and the top five win themes. Some very critical information helped drive the strategy. For example, to work within the constraint of the customer's budget, the program plan was constructed to ship product prior to the end of the customer's fiscal year. The solution architect provided insightful inputs from the bidder's conference and from his pre-RFP discussions with the customer. The themes were quickly mapped into a draft executive summary and shared for iteration with the team.

> *A well-coordinated team, a well-defined win strategy, and a well-documented baseline led to a concise, graphically oriented proposal that was easy for the customer to evaluate.*

Documenting the executive summary's themes early in the process helped refine competitive discriminators and value-added ideas. The team used the technique of graphics first, followed by bulleted theme statements. These PSWs (Proposal Storyboard Worksheets) were then "Pink Teamed," meaning that outside reviewers reviewed what authors were going to write BEFORE they wrote it. White papers (short 1-2 page papers taking a proposal position on a critical issue) were developed for those items likely to be perceived by the customer as program risks.

The Proposal Baseline Review (PBR) was held and a technical baseline, schedule, and organizational chart were shared with the entire team and placed under configuration control. Because the sales person and the solution architect had driven the specification, the company could bid in a compliant manner. After all, they worked with the customer to modify any specifications that could not be met during the pre-RFP phase. An off-project, non-advocate team review (Red Team review) held weeks prior to the proposal due date allowed time for further revisions recommended by the reviewers, who emulated the customer evaluators. A final review was held just prior to the proposal submission to correct editorial errors and inconsistencies.

Early customer contact, a well-coordinated team, a well-defined win strategy, and a well-documented baseline led to a concise, graphically oriented proposal that was easy for the customer to evaluate. The executive summary was engaging. The final proposal read like one author wrote it, rather than several different authors. It was terse and written in the active voice. It made it easy to evaluate for compliance and to identify and locate value-added items. Based on a scan of the theme boxes, it was clear that all of the customer's major concerns were addressed with strong benefits. Because there was minimal rework, the team met the preparation Bid and Proposal (B&P) budget.

The team was tired, but morale was high and the team members celebrated the submission of a winning proposal.

Post-Bid Phase – for a Win

The customer's response was instructive: "*Your Proposal was, overall, the best by a large measure. It described the best total solution by far. The style of the document, including the color, was a pleasure to work with and read. The graphics and diagrams provided excellent support for the text and brought all the points together in a visual format that made it easy for the new team members to understand and shortening the comprehension time. The description of choices was excellent and the best at defining the costs/benefits. The inclusion of cost saving potentials in the pricing was very good input, although it was not measured in the analysis, it did enhance the level of confidence in the quality of the proposal. In conclusion, your proposal was the best and sets a new standard for the quality and organization of a proposal.*"

Based on the quality of the proposal, the contract was signed after just two weeks of negotiations. At award and later at the Design Review, the customer executed priced options that created additional business opportunities.

Case Study of a Loss

One of my mentors spelled out what it is really like to work on major proposals:

> "We suffer through the frustration, lack of sleep, endless disagreements, humiliating reviews, out-of-control preparation costs (B&P), good strategies, bad strategies, upset families, 3X over the page count, unreadable graphics, cold pizza, waking in the middle of the night in a cold sweat and getting up to write down ideas, and families that are sure we are possessed. This process is even more painful when you lose!"

This following case study was in response to an RFP for an avionics system to be installed on a fighter jet. The RFP included Federal Acquisition Regulation (FAR) flow-downs, emphasized military specifications, and required the provision of the equipment, engineering, and program management services to a large prime contractor working for a Department of Defense (DoD) agency. There were three major bidders. We were one of the market leaders in this specific area.

We did not have a cohesive win strategy. Even the makings of the win strategy had not been documented or communicated to the capture team.

Pre-Bid Phase – for a Loss

This opportunity caught us off guard. We started late. Our market research person discovered the opportunity at www.fedbizopps.gov (FedBizOpps) and e-mailed the solicitation notice to a huge e-mail distribution list in the hope that someone would do something. We had not met the customer, but hoped to see him at the Industry Day vendor's conference. We did not do any pre-selling or positioning. We did not know the "story" behind the procurement [White, 2003]. We did not know the implicit requirements or the driving cluster of rationales behind the requirements. We did not have a cohesive win strategy. Even the makings of the win strategy had not been documented or communicated to the capture team.

Bid Phase – for a Loss

Unfortunately, we were now in the customer's "quiet period" or "black out." Since the RFP was released, we were not allowed to have contact or meet with the customer directly. All questions regarding the solicitation were passed by formal submission to the Contracting Officer, and all bidders received identical answers posted on a government Website. These public answers to our questions were generic and underwhelming. Worse yet, some of the questions we were forced to ask over a public forum provided competitive intelligence to the other bidders.

As one of the market leaders in this specialized area of military avionics, we had an over-confident attitude that even though we had not focused specifically on this particular opportunity, we still "deserved" to win with a minimal proposal effort. Because management had set no real priority on this opportunity, everyone was busy on other projects. Over a week had gone by and we were still deciding whether or not to bid. We finally half-heartedly decided to bid, but no one from senior management was involved in the decision. The kickoff meeting was confusing and ill-prepared. The RFP was still being copied in the reproduction center and there were no milestones or strategy discussions. With no formal agenda, meetings turned into technical sessions discussing random topics. Many people seemed to be Professional Meeting Attendees (PMAs) — they simply monitored the process without taking responsibility for any action items.

At this point, we assembled an *ad hoc* proposal team. Everyone on this team was busy and could only multi-task and work part-time. Most were annoyed by the added workload. No one had a vision of how we could win. A separate B&P account had not been set-up since management was hoping that people would work on this on their own time rather than during "billable" hours. Halfway through the effort, our solution architect was re-assigned. Amazingly, the Program Manager took a vacation at this inopportune time.

Since it appeared that the customer wrote the specification around our competitor's system, we were non-compliant on many requirements. We had a fuzzy baseline, and we used standard boilerplate language from other proposals. We were not specific about using the customer's name and in one case we failed to replace the wrong project name in our proposal. In fact, on one page our own company name appeared nine times and we never mentioned the customer's name. The proposal centered on the products we wanted to propose and not on those the customer wanted. We listed features *ad nauseam*, but failed to tie features to customer benefits (usually things that are better, cheaper, or faster for the customer).

…We listed features ad nauseam, but failed to tie features to customer benefits (benefits are usually better, cheaper, or faster for the customer)…

We held a Proposal Baseline Review just days before the proposal was due. It did not help and it did not resolve the fuzzy baseline in time. It was just a checkmark in an internal process box. Since we did not have time, the predominately textual proposal was far too wordy and long. The sections were confusing and inconsistent. We were not clear on exactly what we were proposing. The technical proposal did not correlate well with the pricing or management volumes.

We tried to convene daily proposal team status meetings. Very few authors attended, so we stopped trying to meet and relied on e-mail instead. When we finally did get together, we discovered that we were far behind schedule. As the proposal deadline approached, we asked for an extension, which was reluctantly granted by the customer. He was not happy about the delay. Even with an extension, however, there was no time for a Red Team and we only had a few hours for the salesperson to haphazardly read through our proposal before we had to submit. No time was left to address some of the critical deficiencies.

Rather than addressing "show-stopping" issues head-on, we avoided them and hoped the customer would not ask questions about them.

Because there was massive rework along with the extension, we had to pay our staff a huge amount in overtime for a herculean effort to finish the graphics and production. We drastically exceeded our B&P budget.

The team was exhausted and no one was in the mood to celebrate such a weak response. Management applauded the hard work and effort, although no one was optimistic that the last-minute surge of activity would translate into a winning result.

Post-Bid Phase – for a Loss

We had a few "show-stopping" issues that lost the contract. Rather than addressing these issues head-on, as we should have, we avoided them and hoped the customer would not ask questions about them. Unfortunately, these issues came back as deficiencies during the Q&A period. We never made it to the negotiation table. Our competition offered an innovative solution that used Commercial Off the Shelf (COTS) products and a shared processor and power supply that drastically lowered the unit production cost. Amazingly, our core team dismissed the competitor's approach as not technically superior, when in fact it was quite elegant and provided a best-value solution.

One of the key lessons to be learned from this case study is that last-minute proposals do not usually result in a win. The proposal is the final exam. If you have not done any homework ahead of the final, you will not score well and you will not win. Certainly everyone has an anecdotal account about winning when a bid was due the following week and they had not even started, but like the gambler at the racetrack, we only hear about the wins, not the many losses. It is important to start early, focus, assign a committed and dedicated team, and drive the proposal from the top (upper management) down.

...Start early, focus, assign a committed and dedicated team, and drive the proposal from the top down...

Some of the differences between winning and losing capture efforts are summarized in Table 1.

Five Cardinal Rules

Often, a company's proposal center distributes lessons-learned forms for completion after each loss. It is just as important to capture lessons learned after a win to

Table 1 – Important Differences between Winning and Losing Proposals

see what your team did right. If such lessons learned are stored in an obscure, hard to find database, the same mistakes will often be repeated by a different capture team. I call this phenomenon "lessons observed," since they were really never learned by the organization.

In this article, we have observed winning and losing capture case studies. So what did we learn?

Here are five cardinal rules:

1. Start Early
2. Use a Capture Plan and Capture Team
3. Establish a Baseline
4. Write the Executive Summary First
5. Review, Review, Review

Each cardinal rule is described below.

Start Early

The best way to win is to start early. Time is the most precious asset. If we receive an RFP that we have not helped shape through legitimate customer interaction, we are already at a disadvantage.

...The sure way to lose is to operate in a "yellow light" caution mode. This wastes resources. This wastes valuable proposal time...

Football teams prepare in training camp and in exhibition games well before the first regular-season game. Championships, like major jobs, are won through pre-season preparation.

The goal is to win the job *before* the RFP is released. The proposal should be the end (not the beginning) of a long, planned marketing effort. Pre-selling to win is critical. Prior to the RFP is when you can influence the specification, drive the acquisition strategy, influence the evaluation criteria, and establish an internal customer champion.

The best way to win is to start early. Win even before the RFP is released!

The sure way to lose is to operate in a "yellow light" caution mode. This wastes resources and valuable proposal time.

The light must turn either green for full-speed ahead, bid to win, or red for stopping all effort because it is a no bid. A yellow cautionary mode is the worst, since resources are misapplied and the chance of winning is low. Yet, many times a team will stay in the bid/no-bid caution mode. Why? Because everyone wants to get more data before they make a decision. During this time, you are tying up resources, and the time clock and B&P meter are running. In this case, fumbling around in a bid/no bid mode for weeks means that even when you decide to bid two or three weeks later, the competition already has a big lead in the race. The bid/no bid decision must be made early. Particularly for really key opportunities, the decision must be a green light long before the draft RFP is released.

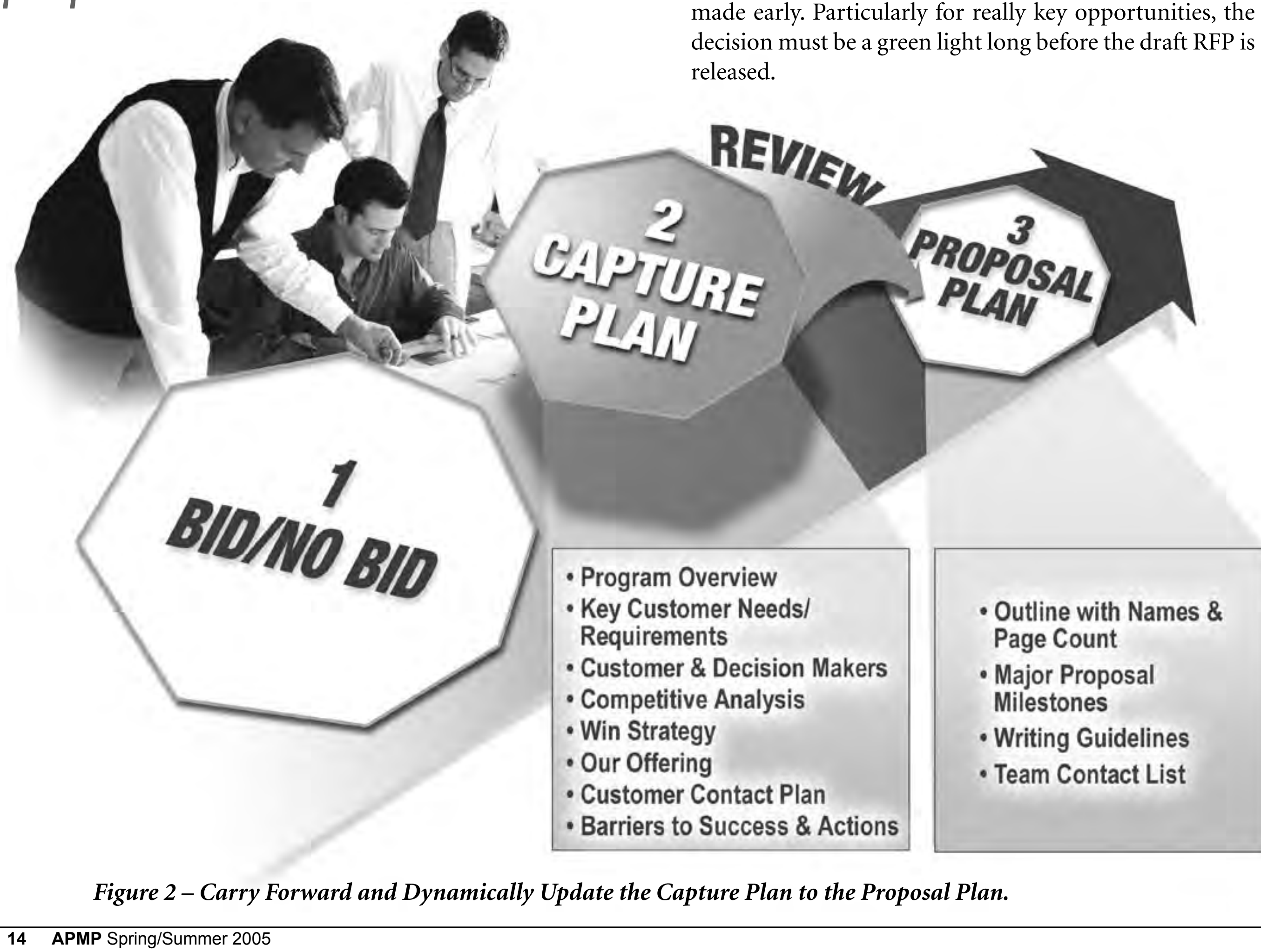


Figure 2 – Carry Forward and Dynamically Update the Capture Plan to the Proposal Plan.

Use a Capture Plan and Capture Team

The Capture Plan is a dynamic living document developed and updated by the salesperson and iterated and approved by the capture team leader. It should be briefed frequently to the capture team for their buy-in and to consider new ideas. The Capture Plan changes and must be updated as the opportunity evolves. A high-leverage activity is to have frequent Capture Plan reviews. Management needs to set aside one day at least once a month) for capture team reviews. A Capture Plan (see Figure 2) must indicate a clear understanding of the customer and the competition at all levels. The plan should also include a program description and background, customer analysis, competitors' strengths and weaknesses, win strategy, teaming scenarios, and actions required to execute the capture process.

The Capture Plan is the foundation for the proposal plan. It keeps management and the team engaged.

The Capture Plan should be developed and available before significant company discretionary funds are approved. While the Capture Plan format is flexible, it should be capable of serving as a standalone reference. The capture team is responsible for developing the Capture Plan and keeping it up to date. The Capture Plan is the foundation for the proposal plan. It keeps management and the team engaged.

The Capture Team

Talent wins small jobs, Teamwork wins mega-deals.

The capture team is the fundamental approach to winning large, complex systems jobs. At a minimum, the capture team should be made up of the "Iron Triangle:"

1. Capture Team Leader
2. Solution Architect
3. Program Manager.

Note that the Capture Team Leader can combine roles or take on the role of the Proposal Manager or the Program Manager, depending on that leader's individual skill set. The Solution Architect can bring a different type of skill set depending on the proposed solution. For exam-

The Iron Triangle.

ple, for a complex system, the Solution Architect would typically be a systems engineer, for a product it may be a product manager, and for an IT service it may be a Subject Matter Expert in consulting.

ALWAYS submit an Executive Summary. It is critical to write the Executive Summary first.

Establish a Baseline

One of the most important things to do on proposals is to have a consistent technical, management, and cost baseline before writing and the costing begins. Too often, we skip this step (or gloss over it without enough rigor). This makes the proposal very disjointed and difficult to understand. A consistent baseline helps the entire team (training, maintenance, etc.) support consistent write-ups. The lead Solution Architect must continually define the baseline and the Program Manager must document how to execute the job. The "big three" items to baseline are a solution diagram (a system block diagram or a model of services offered), an organization chart, and a one-page master schedule.

Have a Proposal Baseline Review to solidify and document the baseline solution. Before you write or cost the proposal, you must have this solid foundation to build on. Proposals without a baseline or a plan never converge!

Write the Executive Summary First

ALWAYS submit an Executive Summary – no exceptions [Beveridge, 1978]. It is **critical** to write the Executive Summary first (and always). It helps document the win strategies, themes, and discriminators, and the focus on answering the pivotal question, "Why Us?" Often it sets the stage psychologically for the evaluators. I have heard customers comment that "if the rest of the proposal backs up and substantiates the Executive Summary – you will win." It is a team-building exercise to have early Executive Summary reviews and iterate this work product.

The Executive Summary defines and articulates the customer's vision, which then becomes the team's joint vision. It gives you an opportunity to list some WOW items and to paint the vision. The customer should be awestruck when they read the Executive Summary. The team should be proud to share it. An Executive Summary developed early in the proposal response process addresses some of the controversial decisions and issues up front and forces the team to resolve them. For example, if we can't offer a certain product or feature, why find out at the end? It must be addressed early in the process.

"You don't review a proposal AFTER it's written; you must review it BEFORE it's written" [Beveridge]. While this may sound like a Catch 22, developing the Executive Summary fulfills this mission very well. It is instrumental to develop the Executive Summary, on paper (less than ten pages) and review the "quality of thinking" before time and effort are invested on the rest of the proposal and artwork.

Review, Review, Review

The key to winning is to hold early Capture Plan reviews and relentless rainbow reviews (Blue, Pink, Red, and Gold) per industry standards. The major capture process reviews include the list on page 17.

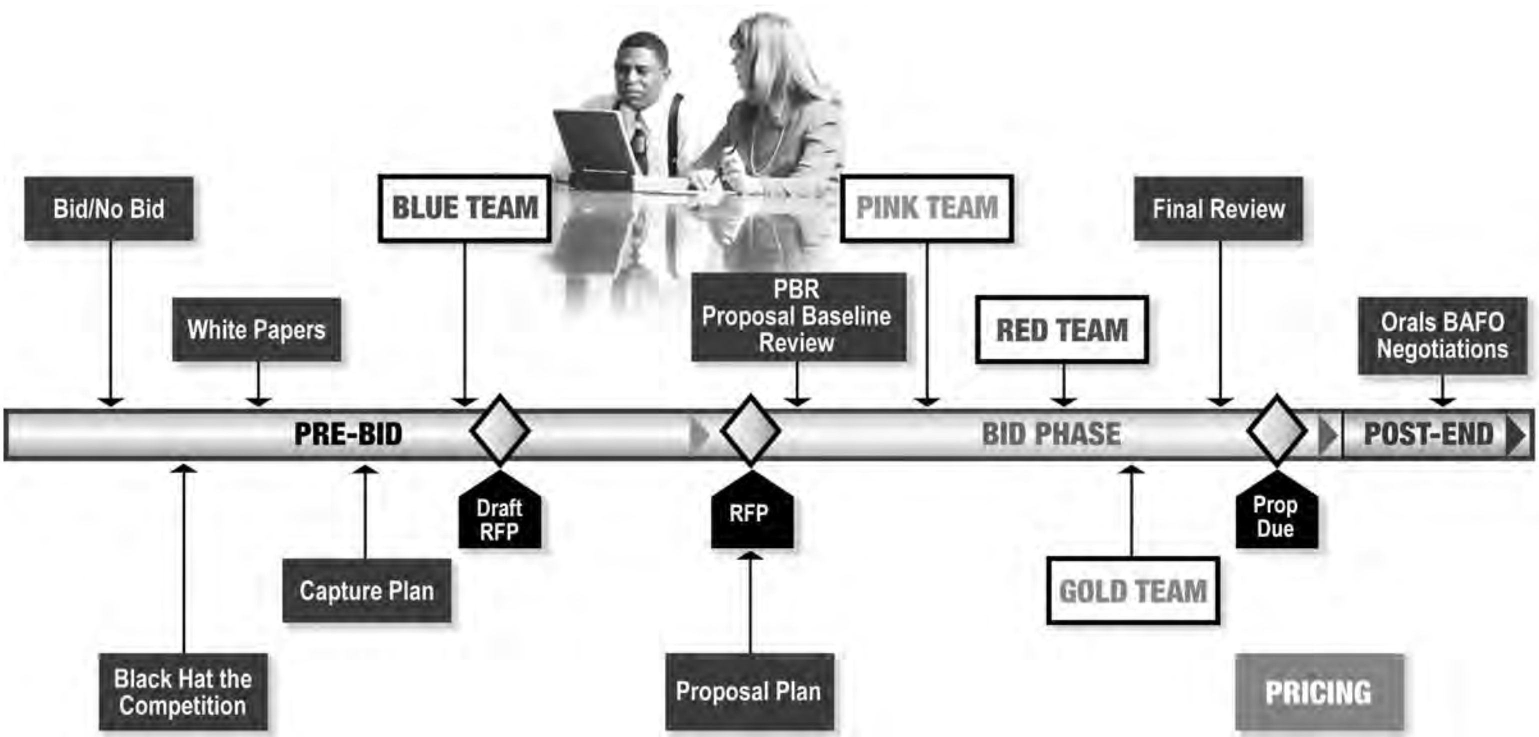


Figure 3 – Review, Review, Review - the Timeline for the Rainbow Reviews. Earlier is better than later.

Review, Review, Review!

The key to a winning bid is to hold early Capture Plan reviews and relentless rainbow reviews (Blue, Pink, Red, and Gold). Per industry standards the major capture process reviews include:

- **Capture Plan Reviews** – Summary of the opportunity, customer, competition, and how and what must be done to win. The plan includes the price-to-win and strategy based on the external environment (competition and customer budget).
- **Black Hat** – Be the competitors. Assign a Black Hat leader (large proposals may assign different people for each competitor) to anticipate competitors' strategies and solutions. Use this exercise to test the soundness and update your Win Strategies. Brief the proposal team on their strategy, technical offering, and estimated price.
- **Blue Team Review** – Executive-level strategy session that is held early in the process. The team discusses the customer needs, fears, biases, and the competitive landscape. Often it is useful to review the key material from the Capture Plan. The output is a validation of the Price to Win, win strategy, and win themes.
- **Pink Team Review** – Off-project review of win strategy, themes, discriminators, and technical approach. A useful tool is a Proposal Storyboard Worksheet (PWS) that includes bulleted text and graphics rather than a rough draft of the proposal. The PWS makes it easy to review and provide direction early, thus saving rework.
- **Red Team Review** – Off-project comprehensive review of the entire proposal. Non-advocate reviewers emulate the customer's evaluation team.
- **Gold Team Review** – The same group of executives and business development people from the Blue Team review and approve pricing decisions.
- **Final Review** – Final check of camera-ready hardcopy print-out of the entire proposal.

Figure 3 shows the sequence of these major reviews. These activities provide a consistent understanding that reflects best practices in capturing new business.

Knowing the difference between winning and losing trends will take you and your organization away from the dreaded loss scenario and propel you into the Winner's Circle.

By analyzing winners and losers in these case studies, we know when the capture team is vectored in the winning direction and when they are off course. Whether you are a Capture Team Leader, Proposal Manager or part of the capture/proposal team, look for trends and speak up when changes are required. Knowing the difference between winning and losing trends will take you and your organization away from the dreaded loss scenario and propel you into the Winner's Circle.

References

1. Garrett, Gregory A, and Kipke, Reginald J. Capture Management Life-Cycle, Chicago, IL: CCH Incorporated, 2003.

2. Beveridge, J. M., and Edward J. Velton. All You Should Know About Creating Superior Proposals but Somehow Never Fully Understood. Talent, Oregon: J. M. Beveridge and Associates, Inc., 1978.

3. Miller Heiman (Stephen E. Heiman and Diane Sanchez), The New Strategic Selling. New York, NY: Warner Books, Inc, 1998.

4. White, Richard J., Federal Marketplace Proposal Seminar, McLean, VA, 18 November 2003.

Keep your Iron Triangle together, your reviews on schedule and your proposal responsive to customer needs and you'll be standing in the Winner's Circle in no time!

Jay Herther has more than 17 years' experience as a Capture Team Leader and has used these techniques to lead Capture Teams to achieve a 78 percent win rate on major bids. He is currently a Market Director for a leading supplier of critical communications systems and equipment for public safety, utility, federal, and select commercial markets. He is a new member of APMP. Mr. Herther can be contacted at Herther3@comcast.net.

Article

Extra, Extra!

Read All About It!

Using Newspaper Techniques for Proposal Development

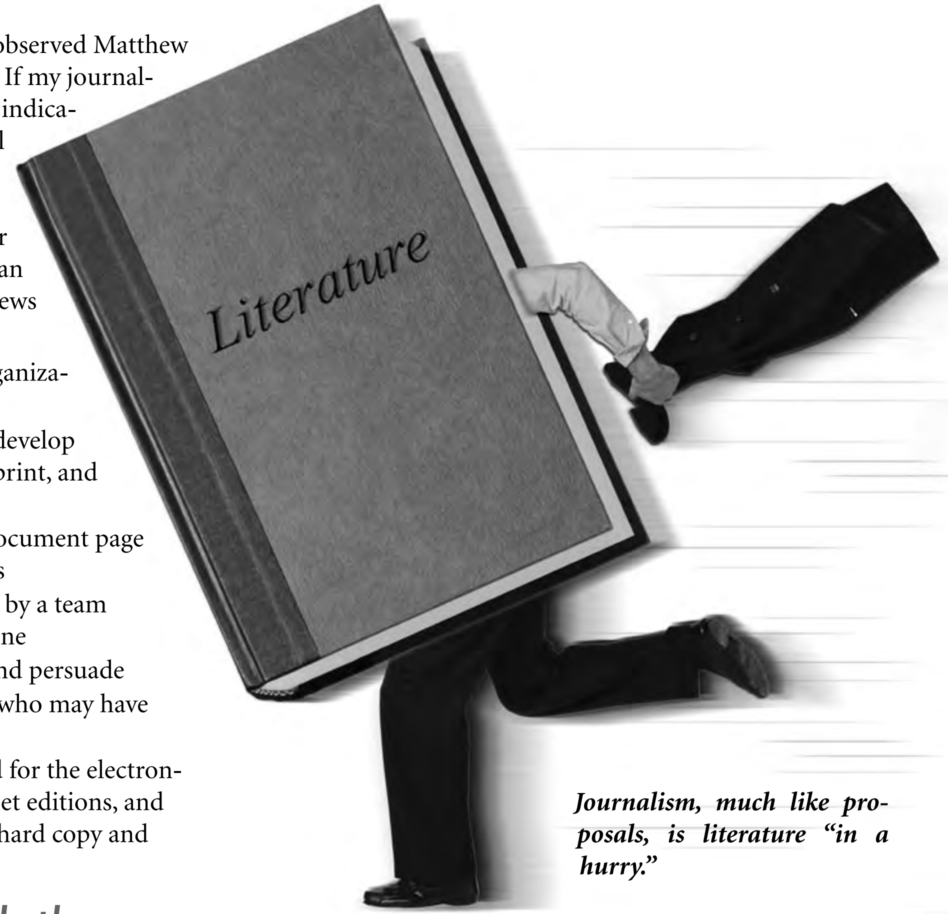
by Chuck Keller

Journalism has many practical lessons to teach proposal professionals, from writing to using graphics to organizing proposal teams. All of us read newspapers. Our challenge is to use the journalistic techniques to make our proposals more readable, compelling, and persuasive.

"Journalism is literature in a hurry," observed Matthew Arnold, a 19th century English poet. If my journalism and proposal experience is any indication, he might have defined proposal development the same way. I have observed that both newspaper and proposal development include similar tasks, and that proposal professionals can learn from those who work for the news print media.

Both newspaper and proposal organizations require their staffs to:

- Manage the resources needed to develop text and graphics, and to layout, print, and deliver the document
- Work within the constraints of document page limitations and delivery deadlines
- Produce text (copy) and graphics by a team working against a looming deadline
- Provide content to inform, sell, and persuade
- Meet the varied needs of readers who may have little time to read the document
- Produce documents for print and for the electronic media (newspapers post Internet editions, and proposals are often submitted in hard copy and computer files).



Journalism, much like proposals, is literature "in a hurry."

A newspaper can be both the model for developing your proposals and the source of those proposals.

Newspapers also post request for proposal (RFP) announcements from government agencies, and these RFPs lead to proposals. A newspaper can thus be both the model for developing your proposals and the source of those proposals.

I have worked 22 years in the proposal profession. However, in a prior life I earned a BS degree in journalism and was a newspaper reporter for two college and two daily newspapers. While on active duty with the U.S. Navy, I served as public affairs officer, producing press releases for an aviation squadron. My journalism experience taught me lessons I now apply in my proposal work and teach in proposal workshops. This article presents the lessons I have learned from my experience, supported by observations from six APMP colleagues who also have journalism and proposal backgrounds.

Organize, Hire, and Manage Like a Newspaper Staff

Newspaper and proposal staffs must both produce a document. This involves the same types of employees, job functions, and publishing tools, including hardware and software. Common tasks include organizational structuring and staffing, and the management of personnel and material resources.

Reba Shoulders, an APMP member[1], noted the division of functions in the two organizations. "I have seen varying degrees of segmentation of roles and responsibilities in proposal departments, similar to the way newspapers delineate reporters from editors and editors from photographers, etc.," she said. "Also, the division of subject matter areas into sections of a paper could be compared to dividing sections of a proposal by subject matter or dividing responsibilities for proposal content by subject matter expert (SME) categories."

The proposal manager acts in similar fashion to a publisher, especially in that they are also involved in budgeting issues.

Another APMP member, John Elder[2], said "From an organization standpoint, the relationship between book boss and author is not unlike that of editor and reporter. The proposal manager acts in a similar fashion to a publisher, especially in that they are also involved in budgeting – B&P – issues, much as the publisher acts as on the paper."

A typical daily newspaper has too many people in too many roles, facing too many deadlines, to operate without a sound process and a management structure to execute that process. Newspaper management is tested daily to meet deadlines for the production and delivery of different newspaper editions. While proposal organizations also meet production deadlines, few face such persistent deadline pressure. Still, the same staffing, organization, and process considerations apply to both.

> *Newspaper and proposal organizations are best served by hiring employees who have the work ethic, communication skills, and personality to work in a setting of deadlines and team collaboration.*

Staffing

Proposal organizations should consider hiring reporters and college graduates in journalism for proposal work. Steve Jensen[3], an APMP member, agreed. "Being a former reporter, I prefer to hire proposal specialists who have had writing experience, preferably newspaper writing experience," he said. "My feeling is the proposal organization deals primarily with written communication. Words are our tools. Proposal departments need people skilled in written communication. Most companies have plenty of managers and engineers who can deal with the technical and business aspects of the company, but they have few writers."

Newspaper and proposal organizations are best served by hiring employees who have the work ethic, communication skills, and personality to work in a setting of deadlines and team collaboration. Hamby Groover[4], an APMP member, identified many common skills and tasks, including "researching; writing; editing; matrix managing a group of subject matter experts; gaining approval; setting up production schedules; and checking facts and figures for accuracy." She also thought the two professions share the need "to swill a lot of bad coffee and eat a truckload of bagels."

> *Whether you think it fair or not, the visual appearance of your proposal can have as much impact on the customer as what the proposal offers.*

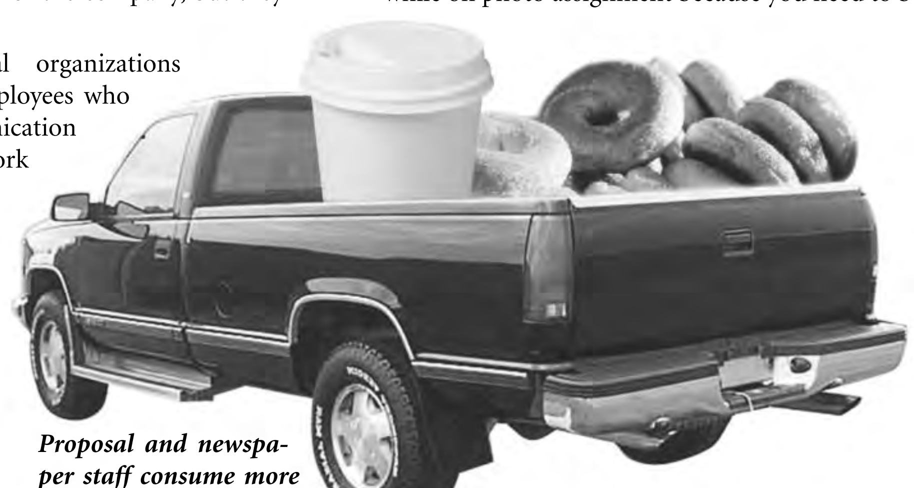
The ability to work with others is important in both professions. According to David Sotolongo[5], an APMP member, "The similarities between journalists and proposal managers hinge mainly on interpersonal skills. If you have them, you will be successful at either." To be able to work in stressful situations is also important in both lines of work. "The working conditions of newspaper life also make its professionals good selections for proposal work because they have experienced overtime and pressure in their work," said Shoulders.

Organization and Process

In the sidebar at the right are lessons that proposal organizations can learn from newspaper practices to manage their staff and processes.

Additionally, my experience as a college journalism student illustrates these last two lessons.

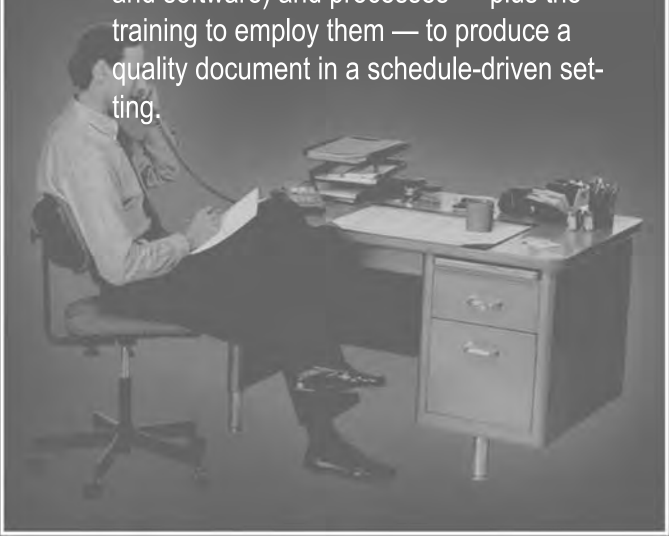
- My photojournalism class was assigned to take photos of a person making a speech, a frequent and sometimes mundane duty for newspaper photographers. With other students, I moved around the room with my 35 mm camera, busily photographing the "speaker," who was my photojournalism instructor. The speaker droned on as I shot photo after photo. Suddenly, an intruder came up to the speaker and hit him with a "pie." Unfortunately, I was not able to photograph the "attack" because I had used all the film in my camera. I learned a key lesson: never shoot all of your film while on photo assignment because you need to be



Proposal and newspaper staff consume more cups of bad coffee and truckloads of bagels than any other profession.

Organization and Process

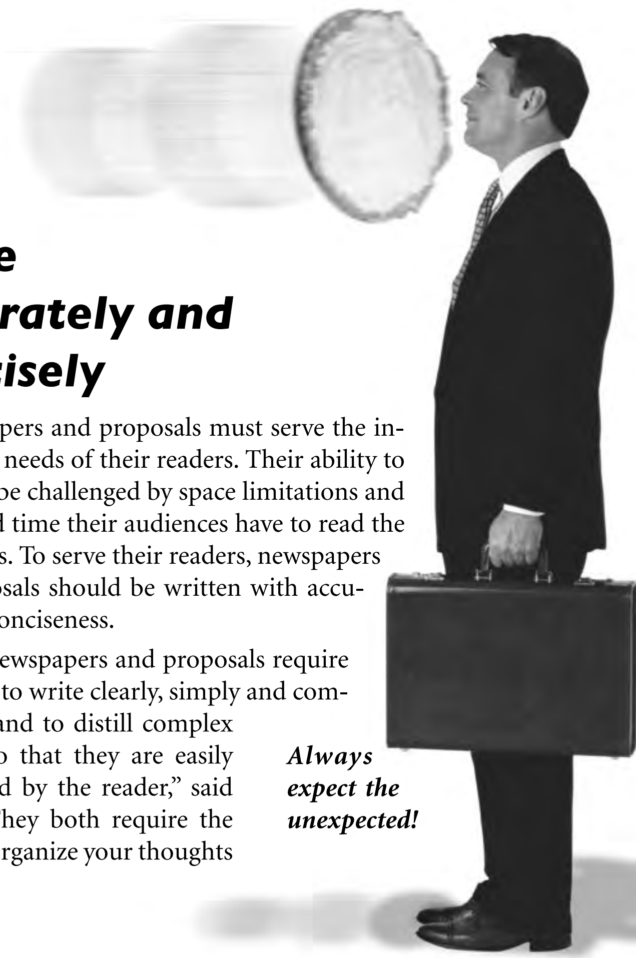
- Set a defined and repeatable process for each function in the document chain so all staff members know their function, responsibility, and authority.
- Develop a network of editors and subeditors with clear authority and lines of communication between them and the writers, illustrators, photographers, and desktop publishing specialists they supervise and support. All should understand the final authority for making personnel assignments and deciding what will appear in the document.
- Conduct daily sessions to plan and discuss document assignments and content and to evaluate the status of ongoing work. Copy the daily editorial meetings that newspaper management holds to plan news assignments.
- Firmly, but fairly, manage all functional organizations in the document process. Especially ensure that the writing function (and other front-end tasks) do not encroach on the time needed by the production, printing, and delivery staffs to perform their jobs.
- Work to an established schedule, with contingency plans to resolve or work around unexpected problems.
- Provide your staff with the tools (hardware and software) and processes — plus the training to employ them — to produce a quality document in a schedule-driven setting.



ready for the unexpected. (An updated version of this lesson: always have a back-up battery for your digital camera.)

- This photojournalism course also taught me about using the right tools. I shot and processed a photo for the class and was pleased with the content and composition. However, my instructor criticized it because it was not sharply focused. I thought the criticism unfair because I believed it was my lens system — not my photography technique — that caused the problem. To take the photo from a distance, I had used a teleconverter lens, a cheaper and less capable substitute for a telephoto lens. It could take a photo with the same magnification of a telephoto lens, but could not match its sharpness. My photo was a bit fuzzy, but the lesson was not: the appearance and perceived quality of your work are closely linked. For proposal production, this means using the best hardware and software tools you can afford (and then some) to produce a professional-looking document. Whether you think it fair or not, the visual appearance of your proposal can have as much impact on the customer as what that proposal offers.

Newspapers and proposals should be written with accuracy and conciseness.



Write Accurately and Concisely

Newspapers and proposals must serve the information needs of their readers. Their ability to do so can be challenged by space limitations and the limited time their audiences have to read the documents. To serve their readers, newspapers and proposals should be written with accuracy and conciseness.

"Both newspapers and proposals require the ability to write clearly, simply and compellingly, and to distill complex subjects so that they are easily understood by the reader," said Jensen. "They both require the ability to organize your thoughts

Always expect the unexpected!

logically. Both require an inquisitive, detail-oriented mind to thoroughly research the subject before writing about it."

Newspapers and proposals should be written with accuracy and conciseness.

The true test of a newspaper is the ability to provide readers with accurate, informative, and concise "copy" to inform (news stories), persuade (opinions, editorials, and advertisements), or entertain (feature articles and comics). For news stories, reporters are expected to be objective in the information they use (or do not use) writing the facts, not their opinions.

A proposal is not written typically for entertainment or under the pretense of objectivity. But, it should be written *accurately* and *concisely* to inform and persuade readers to buy the proposed product or service.

Accuracy

Lori Granger[6], another APMP member, emphasized the need for newspaper and proposal accuracy. "The most important commonality is the attention to detail and accuracy," she said. "If one piece of information in either source is found to be in error, the validity of the whole document is called into question. Journalism school taught me to write accurately, and to especially fear the misspelled name and the fact error. It is a fear you should have when you write your proposals."

"I know that in college, one typographical error or error in fact meant a failing grade for that day's assignment," said Granger. "Evaluators, who are often looking for a reason to eliminate a proposal, may react similarly to factual errors that they find in proposals."

Do not lead the reader to question whether sloppy spelling will equate to sloppy work.

Verify the use of proper spelling, including names, in your proposals. Do not lead the reader to question whether sloppy spelling will equate to sloppy work if you are awarded the contract. Do not forget to verify the correct spelling (and preferred usage) of personal names. "Kathy" the proposed project manager, might spell her name "Cathy," "Kathie," or "Cathie," or prefer being called "Katherine," "Katie," or "Kat." My most embarrassing misspelling was in a feature story I wrote about a college football player where I repeatedly misspelled his last name. If that was not bad enough, his last name was also misspelled in the headline. It was little solace to me that his name was at least spelled phonetically "correct" and I did not write the headline.

Verify the accuracy of your proposal content whatever the source. Proposal writers often use material from old proposals or other documents for new proposals. The material might have been accurate when originally writ-

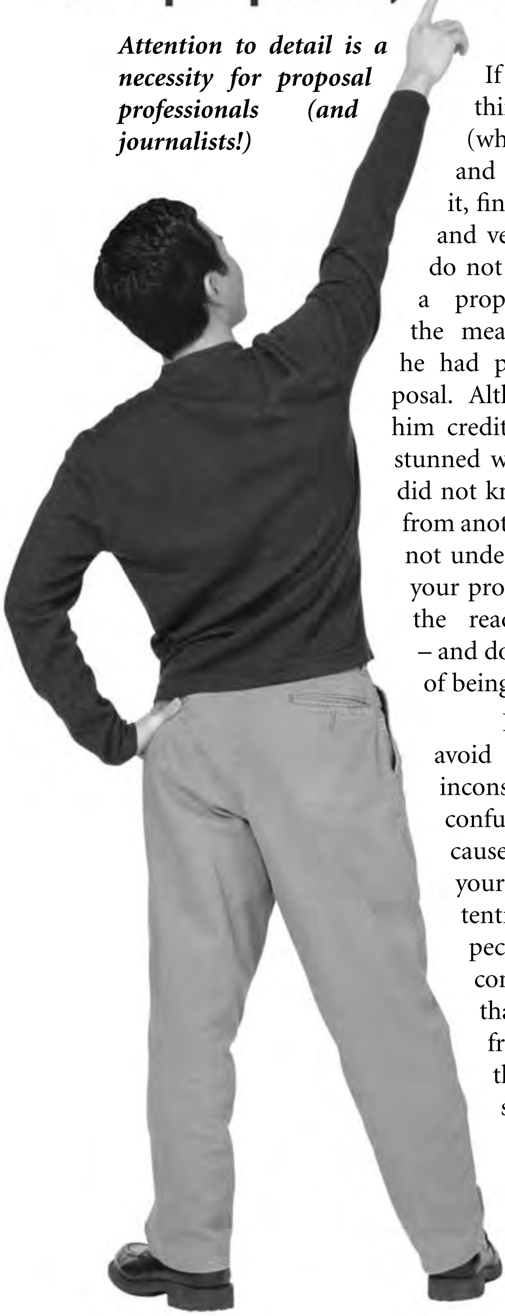
Common Fact Errors

- **Don't assume –** Although I played organized youth baseball for many years and was an avid baseball fan, I knew little about T-Ball baseball, a popular form of baseball for very young children. I wrote a very short notice about T-Ball and linked the game with hitting a ball off a golf-like tee. Clearly, I did not know what I was writing about, because although the game involves hitting off a tee, it is a tee that supports a ball in the batter's strike zone and not low to the ground like a golf tee. (My editor was not pleased with my mistake and had me write a correction in the paper.)
- **Don't believe everything you're told –** I covered a shooting (firearm) competition, a sport for which I had, and continue to have, little knowledge. Told that one of the participants had shot in Olympic competition, I noted this in my article without verifying the claim. Later I was informed that the competitor had not been in the Olympics after all.
- **Give the necessary details –** I wrote an article reporting the unhappiness of a young man who claimed he had not been given a fair chance for playing time on a major collegiate football team. However, I did not give the coaching staff a chance to give its view of the player's assertion – a point well made in a complaint I received from the head football coach. I should have contacted the coaching staff for a comment to be fair to the university, its football program, and, maybe more importantly, to my readers so they could better judge the article's accuracy. I do not know if a coach's response would have caused the readers to question the player's claim – but that is not the point. My error of omission did not allow the readers to make that judgment and, as a result, may have had the same effect as a fact error.

ten, but now may be outdated and wrong, or, it could have been wrong initially. Few journalists or proposal writers write inaccurately on purpose — I know it has never been my intention in my newspaper or proposal work. Regardless, at left are lessons you can learn from three inadvertent "fact errors" I made as a sports reporter for a daily newspaper.

If you do not understand something in your proposal, do not expect the reader to understand – and do not take the chance of being inaccurate.

hte proposol, lookd goood.



Attention to detail is a necessity for proposal professionals (and journalists!)

If you have something in your proposal (whatever its source) and do not understand it, find out what it means and verify its accuracy; or do not use it. I once asked a proposal writer about the meaning of something he had provided for a proposal. Although I must give him credit for honesty, I was stunned when he said that he did not know; he had taken it from another source. If you do not understand something in your proposal, do not expect the reader to understand – and do not take the chance of being inaccurate.

In your proposals, avoid contradictions or inconsistency that can confuse your readers and cause them to question your credibility or attention to detail. Be especially careful to avoid conflicting statements that use information from different authors and document sources. Designate someone to be a cross-read reviewer to look for contradictions, particularly in sections that address similar or related topics or have performance or specification numbers that might be repeated in different proposal sections. Also, ensure that proposal referrals to other sections or page numbers are correct. I get peeved when a newspaper article directs me to a "jump page" to resume reading the article on another page, and when I do, the rest of the article is not there. Also, be consistent in the terms you use in your proposals. For example, if you first refer to the lead of your project team as the project manager, do not later call this person the program manager because you want to avoid the repetitive use of the "project manager" term.

Conciseness

Conciseness is an important feature for both newspapers and proposals. Proposals and newspapers face the challenge of fitting their content within the structure of a page-limited document – and trying to attract an audience that may have little time to read the document.

A newspaper editor plans content based on the number of available pages – and at the page level, based on the space left over after advertisement positions are determined in the layout. In a proposal, the proposal manager plans content often based on page limitations imposed by the RFP – restricting the number of pages for the overall proposal, or for a specific proposal volume or section. I have even seen an RFP limit the number of words for a specific response.

Instill conciseness and brevity in your proposal... if you can express a thought in a sentence with 15 words instead of 25, do it.

"Much as the editor gives a reporter a maximum in column inches, with a deadline, the proposal manager will assign an author a page limitation with a deadline," said Elder. "In both cases, the manager or editor is the final authority on content."

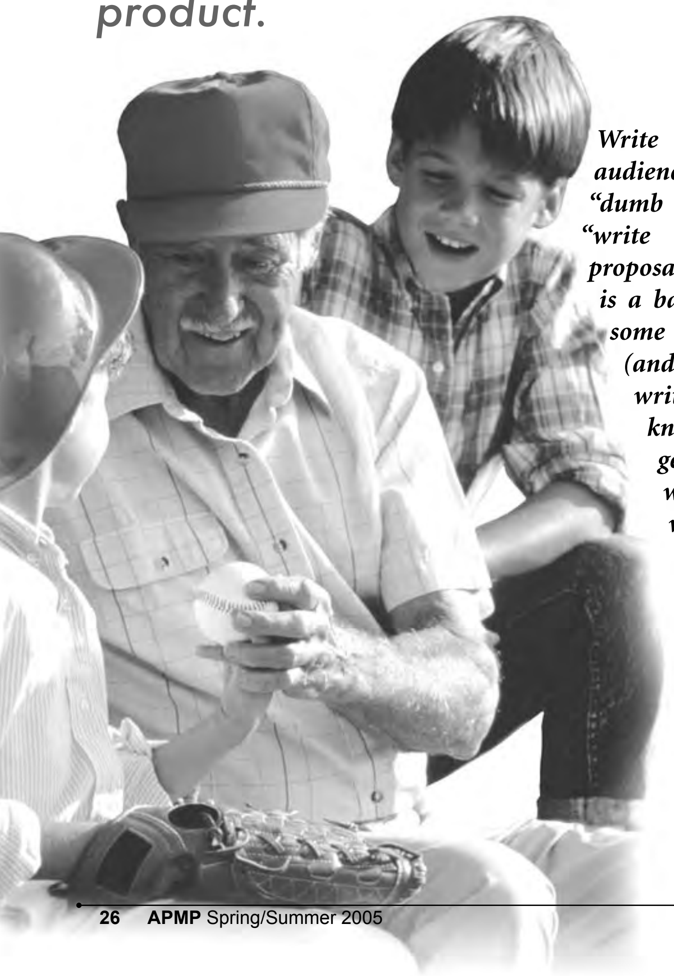
Despite my belief in writing with conciseness and brevity, early in my newspaper career I learned that the lack of both could have had its rewards. My first paying newspaper job was with a junior college newspaper, and I was paid by the inch of copy that appeared in the paper. It was a policy that rewarded volume, not necessarily conciseness. I hope I have outgrown any bad writing habits developed as a junior college journalist.

The following are ways to instill conciseness and brevity in your proposal writing:

- Minimize words, syllables, adjectives, and adverbs. Write as if you are writing a classified ad in a newspaper and are being charged by the word. If you can express a thought in a sentence with 15 words instead of 25, do it. If you can use a suitable word with one syllable instead of three, use it. Do not use unnecessary adjectives and adverbs.

- Avoid *clichés*, slang, jargon, and "pointless variation." *Clichés*, slang, and jargon tend to be wordy. Plus, readers may not understand them, and, if they do, may think they are inappropriate in a formal business proposal. "Pointless variation" is the redundant use of sentences (or words such as adjective or noun synonyms) that have the same meaning. Make your point and move on.
- Use declarative sentences where a concrete noun is linked to an active verb. Limit your sentences to one thought. A long sentence loaded with conjunctions, verbs and supporting clauses, and prepositional phrases and clauses, can often be improved by breaking it into multiple sentences.
- Avoid ambiguity and vagueness in your writing. Write for the person reading your text over your shoulder. A common writing flaw is the sentence that can be interpreted more than one way. You may know what you meant when you wrote it, but fail to recognize that without your knowledge the reader may reach a different conclusion. Edit your work, ensuring that that your readers can only interpret your writing one way – the correct way.

Where journalists have failed in proposals is where they insist on applying newspaper writing style, rather than technique, to the product.



Write to your audience – don't "dumb down" or "write up" your proposal. There is a balance, and some journalists (and propossal writers) do not know how to get out of writing that way.

Newspaper reporters must often write for the "masses" — informing a group that may have weak reading and vocabulary skills. (I think I remember being taught that a news article should be written for an audience with the reading skills of a 9th grader.) Sotolongo cautioned that writing for the mass audience might not be appropriate in proposals. "Where journalists have failed in proposals is where they insist on applying newspaper writing style, rather than technique, to the product," he said. "A series of short sentences, filled with short words, comprising short paragraphs, may not necessarily work on a federal grant, for example. While a lot of proposal writing should be 'dumbed down' from esoteric academia-speak, proposal reviewers are not your average newspaper readers. There is a balance, and some journalists do not know how to get out of writing that way."

Answering the 5 Ws and H is the most basic and important goal in writing.

Provide the Key Facts Up-front and Amplify Key Features

Early in their journalism training, reporters are taught to:

- Tell readers the essential details of the article by addressing the "5 Ws and H" — who, what, when, where, why, and how of the news story.
- Provide these essential details in a "lead" at the front end of the news story, allowing readers to understand the basic news elements of the story without having to read the entire article.
- Use feature stories to amplify the main news article.

Proposal writers should learn to apply these same skills in their proposal sections.

The "5 Ws and H"

Answering the 5 Ws and H is probably the most basic and important goal of newspaper reporters in their writing. It should have the same importance to proposal writers.

In her proposal work, Groover said, " I apply the six basic journalism building blocks — identifying who, what, why, when, where, and how — and establish facts from the traditional criteria of news value: audience, impact, proximity, timeliness, prominence, unusualness, and conflict."

A common weakness in early proposal drafts is the focus on what the customer needs and that these needs will be met, with little detail about the other "W" and "H" questions. Although inexcusable, this lack of detail is

The 5Ws and H

Address the 5 Ws and H to answer the following questions about your proposed product or service:

- ***Who*** will provide it and ***who*** will use it?
- ***What*** does the customer want and ***what*** work is needed to provide it?
- ***When*** and ***where*** will it be produced and delivered?
- ***Why*** is it necessary and ***why*** are you taking this approach to providing it?
- ***How*** will it be produced and delivered, ***how*** will it benefit the customer, and ***how*** much will it cost?

understandable because at this point, the proposal writers typically know what customers need — especially when they are responding to an RFP that tells them what those needs are. What they often do not know is the approach to meet customer requirements. Their writing reflects this.

> *Details spawned by answering the 5 Ws and H can show the customer you have a definite approach to provide the proposed product or service – not an approach that you will work out after contract award.*

To avoid this problem, use the 5 Ws and H as a checklist to verify that you have covered the basics of your proposal topic, whether you are writing a proposal section, volume, or entire proposal. A common dilemma in proposal writing is how much detail is enough. Using a 5 Ws and H checklist will help you balance between too much information (and offering more than you can deliver) and not providing enough (and essentially "parroting" customer requirements and promising to meet them). To amplify your answers to the 5 Ws and H, provide the information you would want to know if you were the reader – something that I think good newspaper reporters do in their articles. Details spawned by answering the 5 Ws and H can show the customer you have a definite approach to provide the proposed product or service — not an approach that you will work out after contract award.

The "Lead"

Simply defined, a newspaper lead answers each of the "W" and "H" questions, in one sentence, or in one paragraph, or several paragraphs. Regardless of how long it is, the lead appearing at the front of the article allows readers to absorb the essential facts of the story without having to read the entire article. Once past the basics of the 5 Ws and H, the news article then provides details to supplement the essentials in the lead. Write your proposal sections the same way.

> *Capture a reader's immediate attention by summarizing the key theme or subject of the topic in the first (lead) paragraph.*

"As a newspaper writer, you are taught to write with economy, simplicity, speed, and clarity. These are key elements to any good writing," said Jensen. "You are taught to capture a reader's immediate attention by summarizing the key theme or subject of the topic in the first (lead) paragraph. Then you present your supporting information in an 'inverted pyramid' form where the most important and relevant information is presented first, followed by information of progressively less importance."

Although a newspaper article will have one lead, a proposal section could have many. Begin each proposal section with one main lead. However, if the section must address a variety of topics, consider using "leads" within the section to introduce each topic. As a result, the proposal section could be written with a series of leads to help guide readers and make it easier for them to understand your "story."

Do not write like the novelist who has the pages (and reader interest) to develop the plot over several hundred pages.

"The concept of the lead sentence can be adapted to the concept of the theme statement in proposal writing," said Granger. The main difference in the two is that a lead sentence needs mainly to be accurate, whereas a theme statement needs to be persuasive. But they both need to capture attention and be complete and accurate opening statements."

Assume that your readers will not read every word in your proposal and that their scanning and reading patterns will mirror those of newspaper readers — that is, they will read the beginning of sections and continue reading until they lose interest and go to another part of the document. Do not write like the novelist who has the pages (and reader interest) to develop the plot and its character leading to a story climax over several hundred pages. In a proposal you are writing for a different reader; they want the vital facts of the proposed product or service and do not have the time or desire to wade through many pages to learn these facts.

In addition to helping the reader, leads can assist newspaper and proposal editors who do page layout and design. If the write-up is too long for its assigned layout space, the editor can trim from the end to make it fit the layout, sparing the essential information at the front.

The point of any interview is to get useful information from your subject. Go into the interview prepared. Learn as much about your subject and topic as possible.

Features

A newspaper may supplement an article with a feature, also known as a side bar, that amplifies the main article. For example, a sports article might report the results of

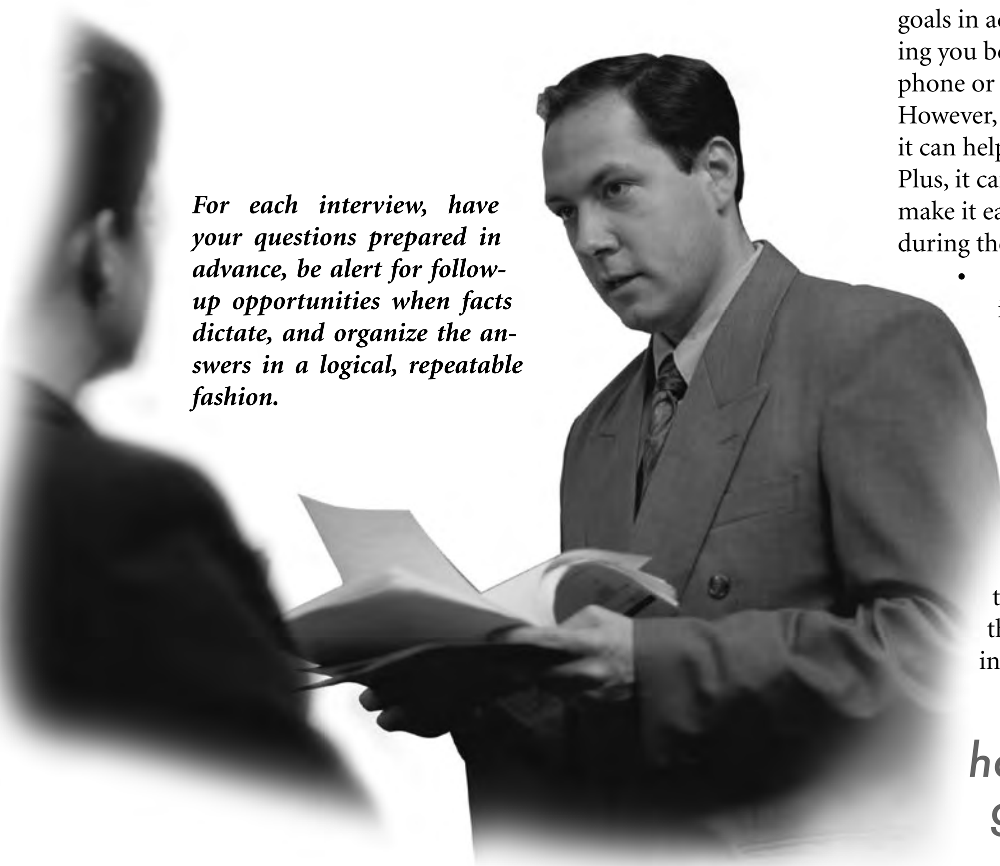
Proposal Features

Use features in your proposals to highlight details for your readers. For example, your proposal features could include:

- A detailed explanation about why you chose a specific solution (technical, management, or schedule).
- A case study of work your company has performed that was similar to the proposed work.
- A client's testimonial about the quality of your services with details about those services.
- Answers to frequently asked questions about your proposed product or service.

a football game, while an accompanying feature could further describe the performance of the winning quarterback and profile his academic and family background.

Preparation is the most critical factor in conducting an effetive interview...A skilled interviewer always knows the topic and person before beginning the interview.



For each interview, have your questions prepared in advance, be alert for follow-up opportunities when facts dictate, and organize the answers in a logical, repeatable fashion.

Interviewing skills are important for reporters because much of what they write is based on drawing information from others. "Newspaper reporters live and die by the interview," said Jensen. "Those with the best techniques get the best results. The same holds true for proposal writers. The point of any interview is to get useful information from your subject. To do that a successful reporter goes into the interview prepared. You need to learn as much about your subject and topic as possible."

Preparation is probably the most critical factor in a reporter or proposal writer conducting an effective interview. An effective interviewer "knows not only what question to ask, but how to ask it, to ensure the answer is honest," said Sotolongo. "A skilled interviewer always knows the topic and person before beginning the interview. Likewise, a skilled proposal manager knows the subject of that particular proposal section — be it past performance, staffing, or corporate experience."

For each interview, Elder recommended "Have your questions prepared in advance, be alert for follow-up opportunities when facts dictate, and organize the answers in a logical, repeatable fashion. Resumes provide the best example of the interview process. You should be sure to have the resume template in front of you, paying specific attention to the relevance of the proposal requirements."

Interviews can be very useful when seeking input from SMEs who do not have the time or writing skills to be effective proposal writers. The following are tips for conducting oral interviews with SMEs:

- **Scheduling –** Schedule the interview and set its goals in advance, ensuring availability and giving you both time to prepare for the interview. A phone or face-to-face interview can be effective. However, the face-to-face approach is best because it can help both parties stay focused on the task. Plus, it can allow for greater personal rapport and make it easier to exchange and clarify information during the interview.
- **Preparation –** Prepare a list of needed information for the interview, and provide it to the SME before the interview. This information can include questions, the proposal outline of the subject topic(s), and copies of the RFP sections associated with the topic. Providing SMEs with this information before the interview gives them time to form their responses and organize their thoughts. It also forces you to prepare for the interview by clearly identifying what information you need from the SME.

Proposal managers must have an extensive toolkit to get information – knowing which environment best suits your client will ensure you get good information for your product.

- **Collection –** Interview the SME following a checklist of required information you have already provided the SME. Take notes — doing your best to write and listen at the same time. If you do not understand or are not sure about something, ask. Consider making an audio recording of the interview, but if you do, also take written notes. These notes will provide you a back up if your recording cannot be understood or fails, and can help you search the tape for specific topics. Make arrangements with the SME to answer any follow-up or clarifying questions you might have after the interview ends.

If an oral interview is not possible, consider a written interview by providing written questions for SME-written answers, boilerplate, or other reference material for revision or editing by the SME, or a draft of the applicable proposal section written by another author for revision or editing by the SME.

"Journalists and proposal managers must also have an extensive toolkit to get information," said Sotolongo. "Some people are more responsive to you in person. Others prefer answering e-mail. Still, others need to converse over food. Knowing which environment best suits your client will ensure you get good information for your product."

Whether you conduct an oral or written interview, have the SMEs review the resulting proposal section for technical accuracy. Always give them the chance to verify the accuracy of the sections to which they contributed.

The point of any interview is to get useful information from your subject. Go into the interview prepared. Learn as much about your subject and topic as possible.

Use all the resources at your fingertips to gather text and graphics – but don't forget to tailor your proposal to the customer's specific needs or interests.

Use Reference Libraries to Gather Text and Graphics

Newspaper reporters use reference libraries to help them write articles that must be written quickly or that contain topics for which they have little knowledge. For example, it is common practice to have biographical information already written for the obituaries of prominent people and then to tailor and update the information to report the individual's passing. While it is doubtful that your proposal will ever need an obituary section, it is likely that it will need reference material from other proposals or documents.

Newspapers and proposals often contain text and graphics drawn from reference libraries: morgues or stacks (newspapers), and archives, libraries, or "boilerplate" (proposals). These resources provide either hard copy or electronic reference information that can be used "as is" or with modification, thus saving time in creating a new document. Data access and retrieval can be performed manually or electronically. (Many newspapers have Internet editions that allow readers to search their stacks or morgues online for topics of interest. The information can be available at no charge or by fee. Proposal writers should consider using these research services to find information about their prospective clients or competitors.)

"Newspaper reporters use reference archives for researching story backgrounds and will incorporate this information in a story," said Jensen. "However, as a reporter you are trained to check the validity of the information you are using in your story and to use archive information as background only to flesh out the details of a story. A reporter enhances and personalizes the story with fresh, updated information. A proposal writer should approach boilerplate text the same way. It can be used as the basis for a response but it must be tailored to the customer's specific needs or interests."

Editors are actively involved in helping reporters plan and write their news stories, and for reviewing and editing those stories.

Use Editors and Style Guides

Study the organizational chart of a typical newspaper staff and you will note a hierarchy of staff writers reporting to a variety of topic/copy editors. This is no accident, because the editors are actively involved in helping reporters plan and write their news stories, and reviewing and editing those stories. With this strong emphasis on the writer/editor relationship, I think it is rare that a story appears in a newspaper without an edit.

Groover said it is important that a proposal manager have "journalistic writing and editing skills," and that these skills include "taking raw responses and body of text and making it readable, accurate, and easy to understand." Unfortunately, I think most proposal organizations commit less time and fewer resources to editing than newspapers, and produce documents with lesser quality text and graphics. I believe there are several reasons for this:

- Many proposal organizations do not hire full-time proposal editors because they have more pressing needs for proposal managers, writers, or illustrators — or just do not have the budget for the positions.
- Without full-time editors, proposal writers are forced to edit their own work, or the edit is assigned as a collateral duty to be performed by a proposal writer or proposal manager, or an editor who serves another publication group, such as a technical manuals group. These editors may not have necessary skills for the job.
- If there are "real" proposal editors, there may not be enough of them to edit the number of proposals produced. This can affect the quality and thoroughness of edits because of the limited time that can be spent editing any one proposal.
- The performance of proposal editors can also be affected by their lack of knowledge of the technical content — a skill that may come only with experience. Without this technical expertise, a proposal editor may be very reluctant to question or edit the writing of an engineer, and therefore, not provide the edit the document needs.

To improve your proposal edits, commit resources to the edit and use a style guide.

Schedule enough time to perform the desired scope of the edit – the level of edit.

Edits

Despite the obstacles they face in performing good proposal edits, proposal organizations should make editing a priority. First, ensure that there are enough skilled editors (full-time, part-time, contract, or "collateral duty") to edit all proposals. Second, schedule the edit as a visible milestone on the proposal preparation schedule and identify the individual(s) who will perform the edit.

As you schedule the edit, allocate enough time to edit the expected page count of the proposal and consider using "staggered" edits in which the sections/volumes are edited as they are completed, not when the entire proposal

Using Library Boilerplate

The following are tips for forming and using library boilerplate in your proposal work:

- **Library Development and Maintenance –** Design and "populate" a reference proposal library that can be easily searched, accessed, and updated. Although it could be a hardcopy library, it makes sense with today's electronic proposals and data retrieval systems to use an electronic library accessible through a database search engine. Develop your own database with a PC, server, or Web-based software, or use the proposal library software sold commercially.[7] Commit the time and resources to frequently and regularly add, update, and delete information in the library for it will only be as good as its accuracy. It does not take long for archived key personnel resumes or past performance narratives to become outdated.
- **Tailoring with the "5 Ws and H" –** Use the "5 Ws and H" approach previously described to tailor the boilerplate. Address the who, what, when, where, why, and how for the proposal at hand, and you will reduce the chance of having your proposal read like it was generically written for any and all customers. Be particularly wary of submitting a proposal with boilerplate that mistakenly refers to a client or requirement for a previous RFP. Perform word searches in your word processing program to delete or replace inapplicable names and terms. Be careful to search both your text and graphics – do not expect your word processor search function to find words in graphics developed and imported from other software programs.
- **Tailoring for RFP Responsiveness –** Use requirements and compliance matrices to ensure that your proposal (and the boilerplate you use) reflects the requirements of the RFP. A requirements matrix cross-references the proposal outline headings to the applicable RFP requirements. Develop this matrix at the beginning of the proposal process to help writers plan the content of their sections. As the proposal nears completion, develop a compliance matrix that cross-references where the RFP requirements are addressed in the proposal. This second matrix will force you to perform an audit ensuring that your proposal has responded to the RFP requirements, and provide a matrix that you can include in your proposal for use by the readers.

is done. Also schedule enough time to perform the desired scope of the edit (also known as the "level-of-edit").

To understand the "level-of-edit" concept, think of asking someone to edit your proposal section. The result might be a basic edit for spelling, punctuation, and subject/verb agreement. Or, it could be a basic edit plus a more substantive edit for proper word usage, and sentence structure, clarity, and conciseness. The point is that the scope of an edit can mean different things to different people. To avoid confusion on what kind of edit you want (or will receive), order proposal edits through "level-of-edit" checklists.[8] When assigning the edit, request the edit you want by marking the checklist "menu" of editing tasks. You may have time only to do a "basic" edit, or enough time to complete a comprehensive "substantive" edit. Marking the checklist will allow you to order an edit with the expectation that you will get what you want within the available time.

Even the best and well-intentioned editors can change the meaning of a sentence as they attempt to resolve ambiguity or fix a statement that makes no sense.

Do not extensively edit proposal drafts that may undergo extensive revision after review. It can be a waste of time to perform a substantive edit on a draft that will be radically re-organized and re-written because of Red Team review recommendations. (Do not use Red Teams as editing teams; they should focus on how well the proposal responds to customer requirements and how persuasively it sells the proposed product or service.)

Supplement your editing by using the editing functions in popular word processing programs. If judiciously used, the spelling and grammar check functions can help you correct a variety of mistakes. Even if these functions are used by an editor, I recommend that authors be required to run their own writing through spell and grammar checks before their drafts are submitted for compilation in the proposal and for final editing.

Allow enough time for the original authors to review and verify the accuracy of the edited draft. Even the best and well-intentioned editors can change the meaning of a sentence as they attempt to resolve ambiguity or fix a statement that makes no sense.

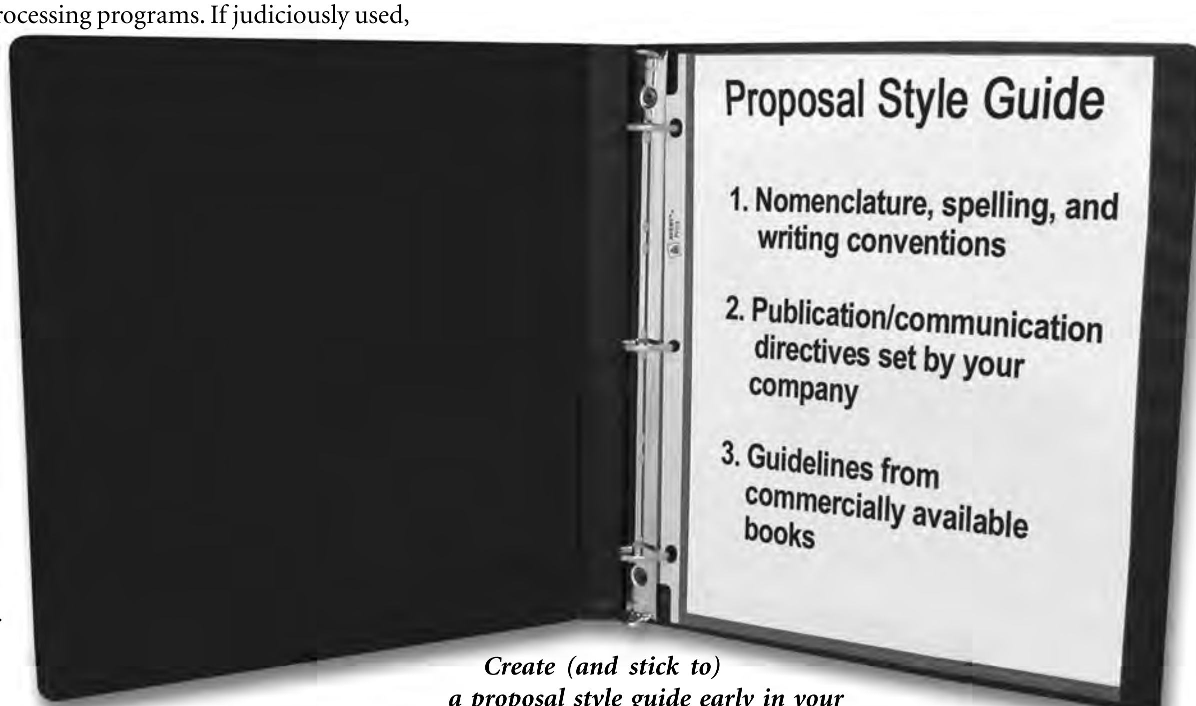
Your style guide should have balance, addressing the most relevant and critical style issues while not trying to be an exhaustive list of writing dos and don'ts.

Style Guides

The Associated Press Stylebook is referred to as the "journalist's bible" for it sets the standards of punctuation, grammar, spelling, capitalization, word usage, and style for many newspaper staffs. It was one of the first reference documents I used as a beginning journalist. Its guidelines, which can be tailored or supplemented by a newspaper's own standards, shape what is written for many newspapers and how they are edited.

Proposal staffs should also use style guides to promote a consistent writing style and word usage — and to have standards that can be enforced through editing. Compile a style guide based on your specific proposal needs combined with standards from among the following sources:

- Nomenclature, spelling, and writing conventions generally accepted by your industry or customers, for example, coming from the RFPs you respond to and the technical/business documents that your company writes



Create (and stick to) a proposal style guide early in your proposal writing to increase consistency.

- Publication/communication directives set by your company for engineering reports or corporate communication such as press releases
- Guidelines from commercially available books.[9]

Your style guide should have balance, addressing the most relevant and critical style issues while not trying to be an exhaustive list of writing dos and don'ts. It should not be so general or brief that it fails to give your writers and editors enough guidance, or be so detailed or restrictive that it is too cumbersome to use or that it discourages creativeness. Having too many rules can have the same result as not having enough: the style standards may be ignored.

Effective proposals should address three key points: the feature of that product or service, the benefit of that feature, and the proof of that benefit.

Propose Your Product or Service with an Advertisement

Most newspaper revenue comes from advertisements.[10] Seeking to sell a product and service, an advertisement is essentially a mini-proposal. As such, it shares the purpose of a proposal to understand customer needs and to meet those needs by proposing a product or service. To propose this product or service, effective advertisements and proposals should address three key points: (1) the feature of that product or service, (2) the benefit of that feature, (3) the proof of that benefit. These three elements make a proposal theme – an explanation of why a customer should buy your product or service.

In newspapers and magazines, note how much more effective advertisements are when they include all three theme elements. (Browse through your old proposals and observe how well they have addressed all three elements. I think you will find that your proposals have frequently ignored the benefit and proof elements.)

Even if you do not sell prescription drugs or satellite systems, develop your proposals like an effective advertisement. Clearly identify the customer needs and address the three elements of a persuasive proposal theme.

Advertisements can also help you perform competitive analysis on your competitors. For example, defense contractors often have advertisements in Aviation Week & Space Technology touting their products or services offered to the U.S. Government in an ongoing competitive procurement. A quick look at the advertisement can identify the contractor's key proposal themes.

Lessons Learned from TV and Radio Advertisments

- Drug advertisements seen on TV often do not identify the medical problem for which the drug is supposed to combat. I do not find these advertisements very useful. How can a drug company expect me to buy the drug (or ask my doctor about it) if I have no idea of its potential benefit to me?

- Even if a benefit is cited, it may not be persuasive if it is not substantiated. Consider radio advertisements for OnStar, a satellite system that links vehicles with an OnStar Center for information and emergency assistance. They substantiate the benefit of OnStar by playing the actual recording of a plea for help and the calm and responsive assistance of an OnStar representative.

Identify Needs and Propose Solutions with an Editorial

I believe that a proposal should be written like an effective newspaper editorial. As I learned as a college journalism student, an editorial should clearly identify and explain a problem and offer a convincing and feasible solution to the problem — all desirable features of a proposal. It was an approach I learned in an editorial course taught by the late Professor H.G. "Buddy" Davis, who had won a Pulitzer Prize for editorial writing with The Gainesville Sun.

Professor Davis' editorial writing method was simple, yet effective, and can be applied easily to proposal writing:

- Describe the problem — targeting a real problem that needs to be resolved
- Propose a viable solution
- Explain how the solution will be implemented.

A good way to provoke his ire was to write an editorial recommending that a problem be solved by contacting your congressman. He wanted editorials to call for action by offering real solutions for real problems — worthy goals for proposals.

Unfortunately, proposals often do not focus on these goals because they fail the "so what?" test of proposal writing. It is a test to determine if the proposal content has value and a purpose to call for action offering real solutions for real problems. Too often proposals fail the test by using what I refer to as proposal "fluff." By the way, the equivalent of proposal fluff in newspapers is called "journalese."[11]

Replace — or at least supplement — your proposal fluff with details that call for action by offering real solutions for real problems. I think that would please Professor Davis.

Avoid slathering your proposal in "fluff." Instead, use high calorie/high protein proof.

Proposal Fluff

The following are examples of proposal fluff:

- Stating you are proud or pleased (Do customers really care, and if they do, how will your pride or pleasure meet their needs?).
- Claiming you understand or are committed (But how will you use this understanding or commitment to meet the customer needs?)
- Citing an objective, philosophy, or policy (Maybe so, but setting an objective, philosophy, or policy does not necessarily translate into action to meet customer needs.)
- Stating something is important or crucial to do (Again, maybe so, but this does not mean that this understanding or sensitivity will translate into action for the customer.)
- Making claims without proof (The repetitive use of unsubstantiated superlatives and embellishments leads to unsubstantiated claims and loss of credibility in the eyes of the customer.)
- Listing features without benefits (Customers do not want to buy the features, they want to buy the benefits of those features.)
- "Data dumping" unnecessary information in the proposal because it is readily available and you think its use will make you look smart. (Do not expect customers to welcome unsolicited material for which they do not have the time, need, or interest to read.)

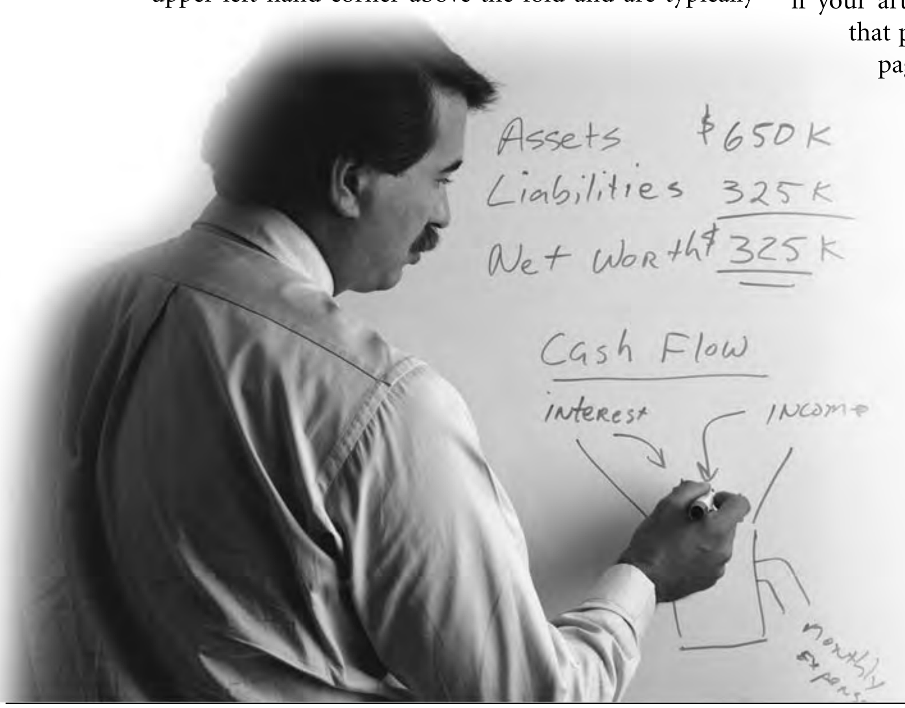
Catch the Attention of Readers Who Skim and Browse

Think about how you read newspapers. You can browse for a topic of interest, looking for a headline or graphic to catch your attention. Or, you can look specifically for a topic. In either case, you may decide to read some or all of the article. If you only read a portion, you may decide that you will return later to read it in more detail. Rarely will you read every article on every page, or read each page starting on the front page and working consecutively through each page in each section of the newspaper.

Proposals should use design elements to attract readers the same way newspapers do.

Accordingly, newspapers use four basic design elements to help readers quickly find and read articles of interest: (1) headlines, (2) text, (3) graphics, and (4) graphic cut lines (captions). These elements provide the reader with "entry points" into the newspaper.[12] Design elements are also used to "sell" the newspaper. Headlines or photos above the crease (the visible portion of the newspaper above the fold) pique the interest of readers as they see the newspaper stacked at a newsstand or mounted in a news vending rack.

Jensen said "Newspaper studies of readers' eye movements have shown that their eyes follow a 'Z' pattern where the first place they look is in the upper left-hand corner and they end in the lower right-hand corner. Knowing this helps influence where you place your graphic elements and text on a page. In newspapers, you will notice that the most important stories start in the upper left-hand corner above the fold and are typically reinforced with a strong graphic adjacent to the story, frequently on the right side."



Proposals should also use design elements to attract readers the same way newspapers do.

Graphics naturally attract readers' eyes and help break up the grayness of text. They also allow readers to more quickly understand proposal details.

Compared to newspapers, the smaller page size of proposals limits the layout and typography options available for attracting and maintaining reader interest. The larger newspaper pages allow for larger headlines, more columns for more creative page layout, and more (and bigger) graphics. Regardless, use the illustration, layout and typography elements described below to attract your proposal readers.[13]

Graphics

Graphics can make your proposals more visually inviting and interesting – and allow readers to more quickly understand what you are proposing. Graphics naturally attract readers' eyes and help break up the grayness of text. They also allow readers to more quickly understand proposal details that would require extensive proposal text.

"Editors are also taught to keep their page layouts clean with a single dominant graphic theme and to avoid a cluttered look," said Jensen. "A cluttered page with too many graphic elements can distract your reader and prevent the reader from focusing on your topic. Another layout technique employed by editors is to place the illustrations so that they force your eye into the story. For example, if your article includes a photo of a person, you want that person looking into the article and not off the page."

First published in 1982, USA Today stirred an industry slow to meet the changing needs of a busy public that wanted succinctly written news in a visually appealing package. Elder noted the newspaper's use of "color, graphics, headings and subheads, charts, maps, and very concise articles — only one per-section jump — to tell the story" and that even The New York Times had changed to take on a USA Today look. "These same techniques should be used in the proposal, not only providing required information, but also giving the evaluator an interesting document to review," he said.

Take extra time early in the proposal process to conceptualize graphics – hire an outside resource if necessary to visualize your solution.

Once typically the domain of illustrators and layout specialists, quality proposal graphics can now be easily produced and then integrated into a proposal by writers with little graphic design or desktop publishing training. For example, both the Word and WordPerfect programs offer easy-to-use functions to produce stylish and colorful pie charts, bar and line graphs, and tables. (The two programs also serve as desktop publishing tools.) Visio software allows the simple production of attractive flow diagrams, organization charts, and schedules. Digital photography reduces the time required for the processing, editing, and layout of photos. Ink and laser printers make it easier and less costly to print proposals with color.

To ensure the reader reads the bottom half of the page, newspaper editors will place eye-catching graphic elements on the bottom left and right side of the page.

There are nine basic types of graphics: (1) flow diagrams, (2) tables, (3) schedules, (4) photographs, (5) pie charts, (6) bar graphs, (7) line graphs, (8) organization charts, and (9) line drawings.[14] I think proposal teams are aware of these types of graphics — and know their value. However, I have observed that they often do not commit the time early in the proposal process to conceptualize graphics and to integrate graphic development with the development of proposal text. Proposal graphics are often an afterthought — developed after the text is written and after the Red Team reviewers complain that the proposal needs more graphics. In contrast, newspaper layouts drive the use and placement of graphics and lead to the early planning of the text and graphics before the associated news articles are ever written.

To improve your proposal graphics, I recommend a journalism-inspired exercise. Collect a week's worth of USA Today, your local daily newspaper, and the popular weekly magazines: Time, Newsweek, U.S. News & World Report, and Business Week. In these publications, find 5 examples of each of the 9 types of graphics. Group the graphics by type and evaluate each, noting its content, design, and captions and how it supported the associated news article (if any).

Headings, Subheadings and "Sigs"

Notice how the type size of newspaper headlines becomes smaller as you approach the bottom of the page, and how article subheadings break up the text and guide readers through the article.

"To ensure the reader reads the bottom half of the page, newspaper editors will place eye-catching graphic elements (headlines and/or illustrations) on the bottom left and right side of the page," said Jensen. "This is called 'anchoring' the bottom of the page. Place graphics flush left or flush right; not in the middle of the page where they can disrupt the flow of the eye."

Standard sigs or "bugs" help break up the proposal in consistent and easily recognizable ways.

Use headings and subheadings to let readers navigate through your proposal and see that you have organized the proposal as required by the RFP. The size, numbering, and style of proposal headings help readers find topics of interest and understand the organization and subordination of those topics. Use different type sizes for different levels of proposal headings. For, example, you might use 14 pt. size for level 1 headings, 12 pt. for level 2, and 11 pt. for level 3 and 4. (I prefer using a decimal system for subordinating proposal headings and limiting the numbering to the 4th level. I think it is hard to understand decimal subordination beyond the 4th level. If you must use headings beyond the 4th level, consider using unnumbered lead-in headings with indentions, italics, or underlines.)

For recurring proposal features, use a sig to make the features noticeable.

Sigs (also known as "bugs") are label headings used for regular newspapers features such as Q&A sections, news briefs, or letters to the editor. Use similar heading approaches in your proposals. For recurring proposal features, use a sig to make the features noticeable. For example, if you provide the RFP requirement as an introduction to the proposal response, box the RFP text (using a font different than the proposal text). Label the box with "RFP Requirement" and include an icon (clip art) of a book entitled "RFP." I recently worked on a proposal where a sig was used. To show our understanding of the proposed work (my client was the incumbent), we used sigs to report the work we had performed for the applicable requirement. In a sig box with a blue border and yellow fill, we provided a quantitative and qualitative description of the work and labeled it "Fast Facts."

Do not get carried away with text emphasis. Screaming is not so noticeable if screaming is your normal way of talking.

Text Emphasis

There are many ways to highlight specific text to attract the attention of readers as they scan the proposal:

- Change its type size or font style
- Use bolding, italics, underlines, reverse type, color, and background shading
- Isolate it from the surrounding text with line spacing and indention, using the power of white space, or place it in a text box
- Use a drop cap (an oversized capital letter that can be very ornate) in the opening word of each major proposal section.

Do not get carried away with text emphasis; it can lose its effectiveness if overused. Screaming is not so noticeable if screaming is your normal way of talking.

Newspaper pull quotes are used to display a selected quote from an article to stress a key point in that article.

Pull Quotes

Newspaper pull quotes are used to display a selected quote from an article. Placed next to the source article, they are used to stress a key point in that article. Use this design device to highlight key parts of your proposal text — it could be a noteworthy benefit of your product or service or a quote taken from the testimonial of a pleased client. "Pull" vital information from your text and place in a box integrated within the proposal text or in the margin. To prominently display the pull quote, apply color to the box lines and background (fill) and use a font and type size to differentiate it from the text it supports.

While things have certainly changed from Mr. Pulizter's time, the lessons learned in the first years of newspaper publishing are very real and pertinent to today's proposal professional.

Bulleted Lists

Rather than describing a series of related ideas — such as features, benefits, recommendations, requirements, justifications, and functional steps — in sentences and paragraphs, break the series into bulleted lists. This design technique can allow readers to more easily and quickly identify the information that might otherwise be buried in gray columns of text.

Put it to them briefly so they will ready it, clearly so they will appreciate it, picturesquely so they will remember it, and above all, accurately so they will be guided by its light.

Conclusion

Joseph Pulitzer, the prominent U.S., newspaper publisher and namesake for the Pulitzer Prize, gave advice that is as appropriate for newspapers as it is for proposals: "Put it to them briefly so they will read it, clearly so they will appreciate it, picturesquely so they will remember it, and above all, accurately so they will be guided by its light."

I hope this article will help you follow Mr. Pulitzer's advice, and that you avoid spilling coffee on your morning newspaper or the final printed draft of your proposal.

Footnotes:

[1]Reba Shoulders – APMP member with eight years of proposal experience (production, subject matter writer, and proposal manager); now a technical writer with Automatic Data Processing (ADP); four years of newspaper experience: college (Western Kentucky University), The Clarksville Leaf-Chronicle (TN), and The Logan Leader and News-Democrat (KY); BA degree (Mass Communications – print journalism core); MAE degree (Counseling), Western Kentucky University; and MS (Technical Communication), Southern Polytechnic State University (GA).

[2]John Elder – APMP member with 10 years of proposal experience; now the Technical Publications Manager, CACI; Managing Editor of the APMP Journal; 11 years of writing and editing experience for radio, newspapers (college – University of South Carolina-Coastal Carolina University, The Baltimore Sun, and Orlando Sentinel), and advertising/public relations; three years as a university journalism professor; MA degree (Journalism), University of South Carolina; and BA degree (English), University of South Carolina-Coastal Carolina University.

[3]Steve Jensen – APMP member with 25 years of proposal writing and management experience; now Director of Bids and Proposals for LogicaCMG Global Telecoms North America; former president of the Central Florida Chapter of the APMP; nine years of newspaper experience: college (Rider College, [NJ]) and Connecticut newspapers (The Hartford Courant, The Hartford Times, and Greenwich Time); BA degree (Journalism), Rider College.

[4]Hamby Groover – APMP member with 12 years of experience writing, editing, and managing proposals, including copywriting and editing for marketing publications; now a Sales Support Lead – Proposals, Digital Insight; BA degree (Journalism), Georgia State University.

[5]David Sotolongo – APMP member with 20 years of experience in business and proposal development; now Director of Strategic Services at RTI International, managing a publications and proposal development staff; Chapter Chair, Carolina APMP Chapter; APMP Chapter Ombudsman (APMP Board of Directors); four years of newspaper experience: college (Duke University [NC] and University of North Carolina), and North Carolina newspapers (Alamance County News, Randolph Reporter, and The Durham Herald-Sun); BA degree (History), Duke University; attended graduate school (Mass Communication and Journalism), University of North Carolina.

[6]Lori Granger – APMP member with 21 years of technical writing (technical reports and software manuals) and proposal experience (writing, volume lead, coordinator, and proposal management). Now proposal contractor/owner of Frosty's Corner Proposal Services; BA degree (General Studies – Technical Writing, with minors in Journalism, English Composition, and Power Systems Engineering), University of Arizona.

[7]For info about proposal library products and other proposal software, see the Spring 2001 issue of the APMP Journal.

[8]The level-of-edit approach, developed in 1980 by Van Buren and Buehler of the Jet Propulsion Laboratory, identified 9 editing tasks and grouped them into 4 categories or levels. The edit tasks ranged from performing typographical and grammar checks at Level 1 to the revising of paragraphs and the document's organization at Level 4. The Van Buren and Buehler method has been the basis or catalyst for many level-of-edit systems. A level-of-edit approach is described for proposal editing in Proposal Writing: The Art of Friendly of Winning Persuasion, a textbook I co-wrote with William Pfeiffer (Prentice Hall, 2000). In it we described editing tasks in three stages (or levels): style, grammar, and mechanical. Publications from The Society for Technical Communication (STC) are a rich source of editing tips:

- "Technical Editing as Quality Assurance: Adding Value to Content," Michelle Corbin, Pat Moell, and Mike Boyd; Technical Communication, August 2002, pp. 286 – 300.
- "Technical Editing 101," Angie McNeill; Intercom, December 2001, pp. 10 – 11.
- "Editing Tests for Writers," Geoffrey J.S. Hart; Intercom, April 2003, pp. 12 – 15.
- "Developing New Levels of Edit," Judyth Prono, Martha DeLanay, Robert Deupree, Jeffrey Skiby, and Brian Thompson; STC Annual Conference Proceedings 1998.
- "Developing a Style Guide in the Real World," Douglas Wieringa, STC Annual Conference Proceedings 1996.

[9]The following publications might help you produce a proposal style guide:

- The Associated Press Stylebook and Briefing on Media Law, Norm Goldstein (Editor), 2004.
- The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publishers, University of Chicago (Editor), 2003.
- The New York Times Manual of Style and Usage: The Official Style Guide Used by the Writers and Editors of the World's Most Authoritative Newspaper, Allan M. Siegal, and William G. Connolly, 2002.
- Style Guide for Business and Technical Communication, Franklin Covey, Contribution by Larry H. Freeman, 1998.

[10]Consider The E.W. Scripps Company, owner of 27 newspapers in 12 states. In its 2003 annual report, the company stated that 78 percent of its newspaper operating revenue came from advertisements. Circulation sales

(home subscriptions and single copy sales) accounted for only about 20 percent of the operating revenue.

[11]In the book The Associated Press Guide to News Writing (2000, The Associated Press, Third Edition) Cappon devotes chapter 5 to identifying and avoiding "journalese." In it Cappon defines journalese by quoting Modern American Usage by Wilson Follett: '"In general, journalese is the tone of contrived excitement. When the facts by themselves do not make the reader's pulse beat faster, the journalist thinks it is his duty to apply the spur and whip of breathless phrases. Since these exist only in finite numbers they get repeated, and repetition begets their weakening, their descent into journalese."'

[12]Osborn observes that "Newspaper layout is merely a means to an end – and the end is making the paper more readable and its stories more accessible," and identifies "entry points" in a newspaper layout for drawing the reader's attention. The "entry points" include headlines, pull quotes, graphics, subheads, icons, photos, bullets, and initial caps. See School Newspaper Adviser's Survival Guide, Patricia Osborn (1998, John Wiley & Sons), p. 284.

[13]For layout ideas to improve your proposals, I recommend The Newspaper Designer's Handbook, Tim Harrower (1998, The McGraw-Hill Companies, Inc.; 4th Edition).

[14]The following books provide graphic and layout tips for your proposals:

- Proposal Guide for Business Development and Sales Professionals, Larry Newman (2001 – 2003, 2nd edition, Shipley Associates), pp. 53 – 62 (graphics), pp. 103 – 114 (page and document design and photographs).
- Proposal Writing: The Art of Friendly and Winning Persuasion, William S. Pfeiffer and Charles H. Keller, Jr. (2000, Prentice Hall), Ch. 5.

Create excitement about proposals early. Enlist interns to help in the development and delivery of proposals. Proposal delivery boys perhaps?

Chuck Keller is the owner of Keller Proposal Development & Training in Pensacola, FL. He is a Charter APMP member and APMP Fellow with 22 years of proposal development and training experience. He is a former newspaper reporter and editor with four years of newspaper experience, including work with student newspapers at Pensacola Junior College (FL) and the University of Florida, and two dailies: The Pensacola News-Journal (FL) and The Gainesville Sun (FL). Mr. Keller can be reached at kellerpdt@aol.com.

Carolyn 101: Business Lessons from *The Apprentice's* Straight Shooter

By Carolyn Kepcher with Stephen Fenichell

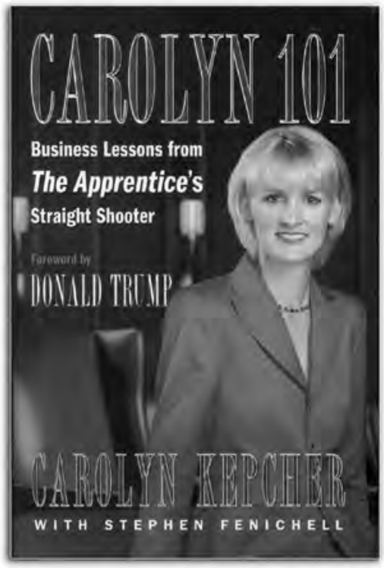
Publisher: Fireside, New York, New York, 2004, Retail Price: $21.95

Reviewed by
Ali Paskun, Lead Proposal Manager
Technical and Management Services Corporation (TAMSCO)

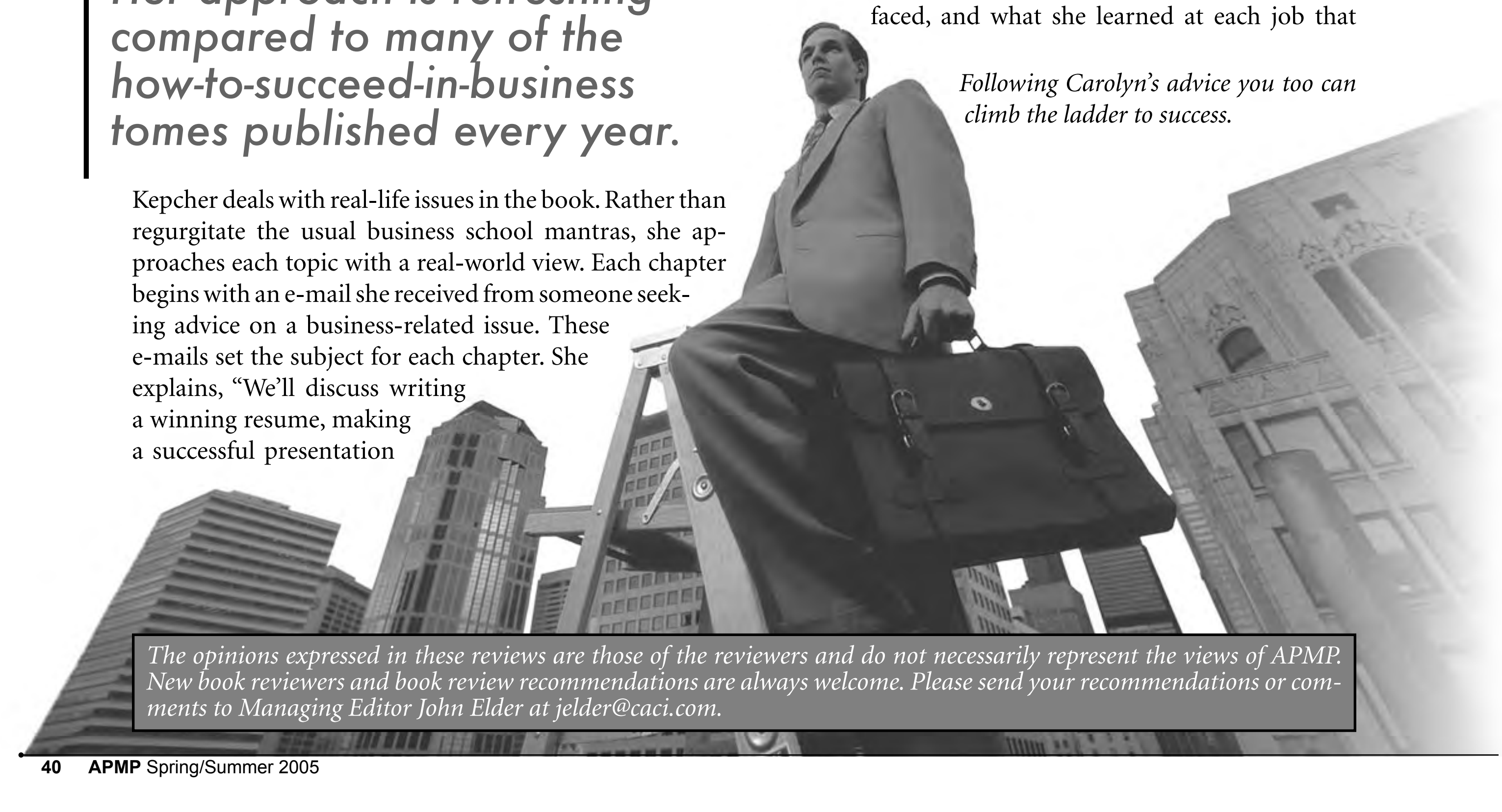
"You're fired!" That now-famous catch phrase can be heard at the end of every episode leading up to the grand finale of the popular TV show, *The Apprentice*. The reality show's host, Donald Trump, is well known. However, one of his costars, Carolyn Kepcher, is developing a following of her own. Kepcher is Executive Vice President with The Trump Organization and the Chief Operating Officer of Trump National Golf Clubs in New York and New Jersey. Anyone familiar with the show knows all too well the confident, cool demeanor and common business sense she brings to each boardroom confrontation. *Carolyn 101* is her first book, but, like the author, it is hardly typical — on several different levels.

Her approach is refreshing compared to many of the how-to-succeed-in-business tomes published every year.

Kepcher deals with real-life issues in the book. Rather than regurgitate the usual business school mantras, she approaches each topic with a real-world view. Each chapter begins with an e-mail she received from someone seeking advice on a business-related issue. These e-mails set the subject for each chapter. She explains, "We'll discuss writing a winning resume, making a successful presentation in a job interview, dealing with bosses, good and bad, employees, good and bad, and colleagues, good and bad. We'll talk about how to dress for success, how to manage a meeting, how to ask for a raise or a promotion, how to manage work and family, and how to play with the big boys (and rarely, if ever, lose)."



Her approach is refreshing compared to many of the how-to-succeed-in-business tomes published every year. Rather than presenting her advice in the style of a Harvard Business School case study, Kepcher simply tells her story. She openly discusses her career from her first job selling Avon in high school through to her current position with the Trump Organization. She describes her experiences, including how she got the position, the difficulties she faced, and what she learned at each job that



Following Carolyn's advice you too can climb the ladder to success.

The opinions expressed in these reviews are those of the reviewers and do not necessarily represent the views of APMP. New book reviewers and book review recommendations are always welcome. Please send your recommendations or comments to Managing Editor John Elder at jelder@caci.com.

taught her how to handle some situation in the future. She doesn't hold back; I think the frankness of her discussion of the "toxic boss" she worked with for awhile will surprise some readers (and no, it is not "The Donald"). To emphasize particular points, 68 "Carolyn 101" principles are spread throughout the book. Some of the principles are:

Kepcher's vast array of experience provides some insight that even skilled business professionals will find useful.

- Once you are the boss, you need to know the answers – or at least where to find them
- Seeing things not for what they are but for what they might be creates opportunities
- The best team is the team that continues to perform even when the manager is absent
- Never use your title as the sole answer to a question
- Just because you've risen through the ranks, don't believe you've paid your dues
- When it comes to assessing people, don't believe what you hear – form your own opinion.

Every reader will learn something from this book. The information will be most beneficial to recent business graduates and junior executives. However, Kepcher's vast array of experience provides some insight that even skilled business professionals will find useful. They can relate to and probably recognize a co-worker or themselves in the work situations described in the book. Also, the book is not geared exclusively to women in business, although I'm certain this group will find inspiration in the success of someone who has become such a well-known female senior executive.

This book is a quick read (just what a busy executive would appreciate!)

Finally, *Carolyn 101* offers a few behind-the-scenes glimpses into the Trump Organization and *The Apprentice*. There are no bombshells or titillating *exposés*; however, they do offer a peak into two pop culture icons.

The book is a quick read (just what a busy executive would appreciate!), but it is well-thought-out and presented in a logical fashion. Its publication was obviously timed to coincide with the popularity of *The Apprentice*, but it doesn't feel "rushed to print." I hope this isn't the last time Kepcher gives us the benefit of her advice.

Carolyn can teach us all something about boardroom etiquette and how to act (and be perceived as!) professional.

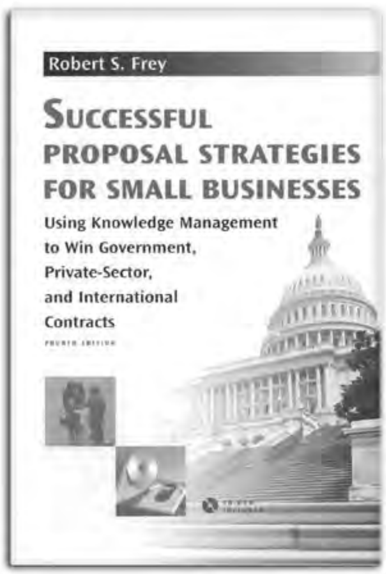
Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (4th Edition)

By Robert S. Frey

Publisher: Artech House, Inc., Boston and London, 2005, Retail Price: $99.00

Reviewed by
Ali Paskun, Lead Proposal Manager
Technical and Management Services Corporation (TAMSCO)

In the Fall 2001 edition of the *Journal*, Susan Bielak reviewed the second edition of this book and wrote, "From beginning to end, this book is a most comprehensive collection of information for the small business sector competing against corporate giants." With the recent publication of the fourth edition, Robert Frey successfully updates information specific to small- and mid-sized businesses, non-profit organizations, and public sector agencies, describing how to implement successful business development, proposal development, and knowledge management processes. These organizations often face the hurdle of limited resources, including personnel and equipment, needed to produce quality proposal efforts.



This book provides an excellent resource for entrepreneurs and small business owners to navigate the sometimes confusing maze of business and proposal development. For example, there might not be anyone on staff with extensive experience responding to Government RFPs. Frey provides easy-to-understand descriptions of how to read an RFP, decipher the FAR, and control bid and proposal costs.

The chapters in this edition are:

1. Competitive Proposals and Small Business
2. Strategic Partnering and Subcontracting Opportunities
3. Marketing to and with Your Clients
4. Requests for Proposals
5. Private-Sector Solicitation Requests
6. The Federal Acquisition Process: Emerging Directions
7. The Proposal Life Cycle
8. Major Proposal Components
9. Acquisition/Capture and Proposal Team Activities
10. The Role of the Proposal Manager
11. Pursuing International Business and Structuring International Proposals
12. Proposal Production and Publication
13. Human and Organization Dynamics of the Proposal Process

This book provides an excellent resource for entrepreneurs and small business owners to navigate the sometimes confusing maze of business and proposal development.

14. Controlling Bid and Proposal Costs
15. Tried-and-True Proposal Writing and Editing Techniques
16. Packaging and Managing Proposal Information and Knowledge Effectively
17. Leveraging Business Complexity in a Knowledge-Based Economy
18. Planning and Producing SF330 Responses for Architect-Engineer Services

However, some restructuring might be considered in future editions, as the chapters are somewhat disorganized. It is almost distracting to have a chapter about international proposals in between ones discussing the role of the proposal manager and the basics of proposal production.

Updated topics related to proposal development include a new and already proven vertical and horizontal proposal review technique.

The many specific updates to this edition include the entire business development/proposal development process. New business development topics include communications planning and execution (public relations outreach) in support of major-impact proposal efforts, competitive analysis, price-to-win analysis, developing powerful "elevator speeches" that tell the story for each major proposal section, and up-to-the-minute techniques for influencing the RFP or RFS legitimately. Updated topics related to proposal development include a new and already proven vertical and horizontal proposal review technique, an expanded discussion of "Black Hat" proposal reviews, and ways to drive customer mission sensitivity into the proposal. Other updated topics include:

- Next-generation government-wide acquisition contract (GWAC) vehicles (e.g., COMMITS NexGen and GSA Alliant)
- Expanded and revised treatment of NASA, DoD, FAA, EPA, and other federal Mentor-Protégé Programs
- The federal government's new subcontracting goals
- Successful 8(a) graduation planning and strategizing
- Additional guidance regarding Performance-Based Acquisition (PBA).

All professionals, regardless of the size of the organization they work for, would benefit from keeping this resource book close at hand.

Although targeted to small businesses, all professionals, regardless of the size of the organization they work for, would benefit from keeping this resource book close at hand. For example, the information on performance-based contracting provides another clue for any proposal professional attempting to determine the best way to respond to this new type of procurement.

The CD-ROM that accompanies the book is a treasure trove of templates and other tools that novice and experienced proposal development and business development staff will appreciate. The "Useful Proposal Templates," provided in Adobe Acrobat, cover everything needed from a sample Client Tracking Table to a Lessons Learned Database. The list of small business Websites includes active hyperlinks for easy navigation to the pages. The proposal and contract acronym list and the glossary of proposal-related terms are an invaluable reference for any professional new to the proposal world. The CD-ROM even includes a Proposal Cybrary Electronic Infrastructure that lays out an easy-to-use way to set up electronic folders for proposal-related files.

There can be no doubt that this edition should find a place on every proposal professional's bookshelf.

This book can help new and old proposal professionals chart a course through the treacherous procurement cycle.

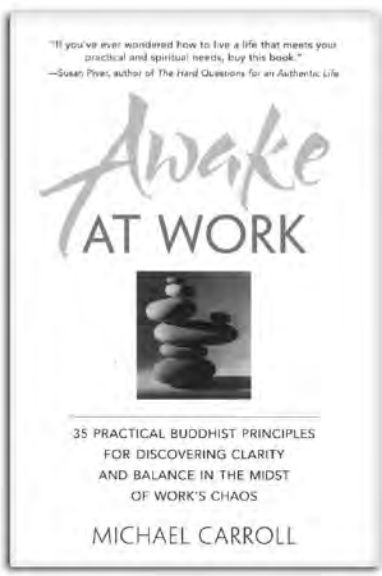
Awake at Work: 35 Practical Buddhist Principles for Discovering Clarity and Balance in the Midst of Work's Chaos

By Michael Carroll

Publisher: Shambhala Publications, Inc., Boston and London, 2004, Retail Price: $29.95

Reviewed by Lori Granger, Assistant Editor APMP Journal

On my way out of the office to fly to the West Coast for a relative's funeral, my supervisor handed this book to me with the comment "This might be some good reading for you on the plane." I didn't realize it during the flight, but I was actually putting some of the book's principles into practice, even though I had only read the first few pages before I started talking to a seat mate. What I did discover reading the first few chapters was that this is an excellent book to read in preparation for our 2005 APMP Conference, *Winning and Living, Achieving the Balance*.



Balance is particularly difficult to achieve for proposal professionals because of the cyclical nature of our work.

I have been struggling with the balance between my work and family life since I started my business as a full-time proposal contractor in 2001. I think balance is particularly difficult to achieve for proposal professionals because of the cyclical nature of our work. My husband knows that once the final RFP is released, he won't see much of me for the next 30 days. It isn't long before my four-year-old daughter makes the same connection. After that deadline, however, there is often a week or two of "not much to do," when I start new hobbies and other projects. These come to a screeching halt when the next RFP is released. This lifestyle is not exactly what I would call balanced.

Although I was born and raised a Protestant, I have long been interested in the teachings of Buddha, not finding what I know of them particularly contrary to the teachings of my more familiar Christian religion.

Find your own inner peace—visit Tibet or discover spirituality closer to home.

I strongly advise all proposal professionals to read "Awake at Work," even if it doesn't happen until the next proposal has been signed, sealed, and delivered. After all, we know that, at least in the federal marketplace, that can't be more than 30 days from now!

My favorite slogan is "Work is a mess." How can you read this phrase and not be nodding your head vigorously?

As are many self-help books, this book is organized around a series of what the author calls slogans. In this case, the book's four major slogans revolve around the need for all career professionals to experience their careers moment by moment. My favorite of the slogans is "Work is a mess." How can you read this phrase and not be nodding your head vigorously? This chapter starts out with the following thought: "Many of us come to work with the hope that we can control our jobs."

Also very true you're thinking, I'm sure. The follow-up section reads "Yet work will not stay in place, despite all our efforts." If you think about this for a minute, even if you absolutely love your job, there **are** days you feel this way about it. The author goes on to quote the ancient Chinese text "The Art of War," still required reading for all military officers. The quote is

"When in battle,

Use the Orthodox to engage,

Use the extraordinary to attain victory."

What is this other than the hackneyed "Think out of the box" mantra of the 1990s? Carroll goes back to the roots of this movement and fleshes it out from a spiritual place. After further explanation of Sun Tzu's approach, Carroll retranslates the passage as

When at work,

Use established routines to pursue objectives,

Use messiness and surprises to innovate and succeed.

I find this chapter quite a fresh treatment of "the out of the box" line of thought.

Other parts of the book address the advisability of experiencing our careers minute by minute. Most of us spend much too much time moaning about the lessons that Proposal Manager Jones didn't learn, instead of trying to figure out how to help Proposal Manager Jones learn those lessons now before it is too late. Those who avoid that trap spend time moaning about the office tyrant whose singular goal must be to make our lives miserable. The most telling principle in this case is "Welcome the tyrant." This principle revolves around trying to figure out what makes the tyrant tick. Let's face it, if you can figure that out, then you can defuse the situation before the tyranny begins. And, probably learn something in the process!

To really put the lessons of this book into practice, I recommend reading it when you're not under extreme pressure.

I have a lot more work to do exploring what this book has to offer. Homework of a sort is assigned, in applying the slogans to your daily life. Carroll doesn't just tell you to do this; he tells you *how* to do it. To really put the lessons of this book into practice, I recommend reading it when you're not under extreme pressure. Start to put it into practice and see what results you get the next time you try to meet a deadline. Perhaps you will be tempted to write that book with the working title, "Zen and the Art of the Proposal Professional."

Take a minute out of your busy day to think through the lessons in this book.

Powerful Proposals: How to Give Your Business the Winning Edge

By David Pugh and Terry R. Bacon

Publisher: AMACOM, a division of the American Management Association, New York, New York, 2004, Retail Price: $24.95

Reviewed by
Jonathon S. Myerov, Proposal Development Manager, SimplexGrinnell

A Whole New Game

Have sales proposals gained greater standing in today's business-to-business and internal corporate environments? Consider this an indication: David G. Pugh and Terry R. Bacon's *Powerful Proposals: How to Give Your Business the Winning Edge* follows closely on the authors' successful *Winning Behavior* (AMACOM, 2003) and *The Behavioral Advantage* (AMACOM, 2004), two books about exemplary customer interaction and the competitive advantage it generates.

If a company choses to stand out positively from the pack, it must generate powerful proposals and consistently capitalize on competitve RFP opportunities.

By its appearance as the third work in this sequence, *Powerful Proposals* signals a growing recognition that quality proposals are integral to success in today's business world. Pugh and Bacon make it clear that (a) proposals present unique opportunities for customers both to learn about and experience a company's distinguishing behaviors, (b) some proposals interact with customers better than others, and (c) those who manage proposal development efforts can do more than describe the symbiosis between customer-directed and intra-company behaviors in their proposals – they can facilitate the relationship.

Like *The Behavioral Advantage*, *Powerful Proposals* focuses primarily on how companies can inspire and cultivate customer preference in the ultra-competitive business-to-business arena. Pugh and Bacon establish two significant categories of proposals: high quality and run-of-the-mill. This bottom-line distinction helps the authors to set up the solution they have developed. If a company chooses to stand out positively from the pack, Pugh and Bacon contend, it must generate powerful proposals and consistently capitalize on competitive Request for Proposal (RFP) opportunities. The authors offer a methodology and set of tools for doing this.

A Contest for Preference

Powerful proposals emerge out of a larger cycle of business activities that shape customer perception and preference. If executed properly, all of these activities, including proposal development, will lead the customer to recognize the difference between a high quality and run-of-the-mill company and then actively favor the high quality company, even if that company's prices tend to run higher.

Consisting of 11 chapters and 2 appendices, *Powerful Proposals* describes activities and presents tools for incorporating proposals into the business cycle and generating proposals that create customer preferences. At the head of each chapter is a "Golden Rule," a proposal-related aphorism tied to the chapter's subject. Many of these golden rules will be familiar to readers of the *APMP Professional Journal*, as they appeared also in Pugh's article "A Bidder's Dozen: Golden

Follow these "Golden Rules" to improve your proposals.

Rules for Winning Work" (Spring/Summer, 2002). Each chapter concludes with "Challenges for Readers," in which readers are prompted to examine their own existing proposals and apply the specific processes and tools described by Pugh and Bacon.

Recognize and grow the technical staff that also enjoys sales—create a competitive advantage that current and prospective customers will value.

Chapter 1 introduces the main principles of the powerful proposal, the secret to making each one unique, distinguishable, and superior. No one who develops proposals full-time will be surprised that this secret has several facets: compliance, responsiveness, selling throughout, and effective communication. Chapters 2 through 4 concentrate on describing the action patterns that result in maximal selling power throughout proposals. The key in these chapters is daily behavior, everyday execution that derives from a clear awareness of what companies and customers want proposals to do.

Chapters 5 through 7 focus on the elements that consistently seem to drive proposal wins and losses in competitive procurement situations. Each chapter describes a different set of win/loss drivers that companies should identify and act upon in their own business arenas. Chapters 8 through 10 examine the everyday issues of proposal development and production, including working under tight deadlines with limited resources, drafting actual proposal sections, and establishing a repeatable yet flexible methodology.

The A+ proposal not only beats the competition but also gives the customer a benchmark of excellence by which to judge other proposals.

Chapter 11 provides a process and tools for conducting customer debriefs after award decisions have been announced. Appendix A discusses the need to recognize and grow the technical staff that also enjoys sales. Cultivating this "rare breed," Pugh and Bacon assert, allows a company to invest in competitive advantages that its "current and prospective customers will value." Appendix B provides two examples of executive summaries, in the issue-driven and ad styles. In both, the graphics deserve close study for the way they neatly support the sales messages.

Making the Right Moves

As in chess, winning the endgame – getting the contract – requires the considerable, concentrated effort of skillful individuals who have the discipline and fortitude to see these efforts through to the end.

The key concepts of *Powerful Proposals* highlight the measurability of proposal quality and the competitive tactics that successful proposals both benefit from and employ. The A+ proposal not only beats the competition but also "gives the customer a benchmark of excellence by which to judge other proposals." The A+ proposal is more than just handsome and well-written; it is powerful because it empowers. It enables customers to sell the project and the company being proposed, and it inspires evaluators to carry the proposing message forward.

Another key concept is the authors' casting of business development as a game of chess. Pugh and Bacon reference "Checkmate! How Business Development Is Like Chess," from their earlier book *The Behavioral Advantage*, no less than four times in *Powerful Proposals*. As in chess, winning the endgame – getting the contract – requires the considerable, concentrated effort of skillful individuals who have the discipline and fortitude to see these efforts through to the end. In the business development endgame, all efforts to establish and build positive customer relations, identify customer needs and issues, and promote the company and its solution become reduced to a deadline-driven response to the customer's RFP. After all of the pre-RFP initiatives and investments, a company may have only a proposal to rely on in a tight competition between companies with similar products and services.

Pugh and Bacon contribute a number of tools that proposal developers will be interested to adopt and adapt. The evaluation tables for executive summaries (Chapter 6) and Pink Team and Red Team reviews (Chapter 10) provide simple, systematic ways of managing a proposal's RFP compliance and responsiveness, as well as its ability to sell throughout and communicate effectively. The 82 questions of the debrief process model (Chapter 11) supply a solid foundation for instituting and administering a full debrief process – both for wins and losses. Often, companies only use debriefs to contact the customer and attempt to get an explanation for a recent proposal loss. Pugh and Bacon offer debrief questions for the customer and the company and they offer a valuable series of open-ended questions for lessons learned.

Customers prefer solutions that actively and vigorously support their core operations, and they will actively and vigorously favor companies with these solutions.

Special mention needs to be given to the GIFBP Matrix, a table template for identifying a customer's specific **G**oals and **I**ssues, which then can be aligned to the proposed solution's **F**eatures, **B**enefits, and **P**roof. This is an indispensable tool that provides assistance in several key proposal areas: generating focused sales messages, maintaining customer orientation, and organizing solution themes. Visually, the GIFBP Matrix underscores the principle that the most powerful link between customer and company results from the company's ability to identify and meet the needs that are most important to the customer's viability. In other words, customers prefer solutions that actively and vigorously support their core operations, and they will actively and vigorously favor companies with these solutions.

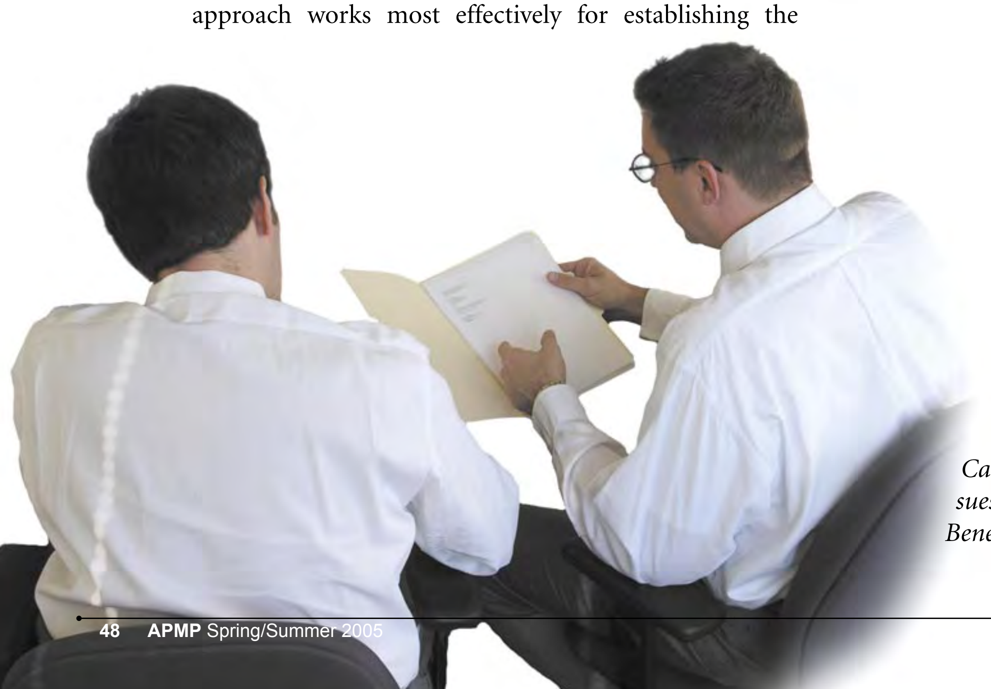
Every Game and Every Player Is Unique

Powerful Proposals succeeds as a "big picture" book. It masterfully employs throughout an approach that proceeds top-down, from big picture to end result. This approach works most effectively for establishing the principal features of high quality proposals. For example, Pugh and Bacon clearly show the priority of a high quality message. Any message in a proposal must enable evaluators to answer one of the Big Four questions: Why us? Why not them? So what? and How so? Certainly, eye-popping visuals and well-written copy are vital to effective communication, but they must serve the purposes of the message.

On the other hand, *Powerful Proposals* might have been even more helpful with further illustration and guidance in some areas. For instance, at one point Pugh and Bacon present an example of a "Me"-oriented proposal response without also providing a second response to serve as a model for improvement. Not too many pages after, they use a different example to show how uncovering and responding to the customer's underlying need constitutes an essential part of customer focus. This is an important point that Pugh and Bacon should have worked through more elaborately. They could have, for example, provided techniques and tools for working with the customer and investigating the hidden issues of specific procurement/solicitation situations.

Every proposal process presents its own unique challenges and issues.

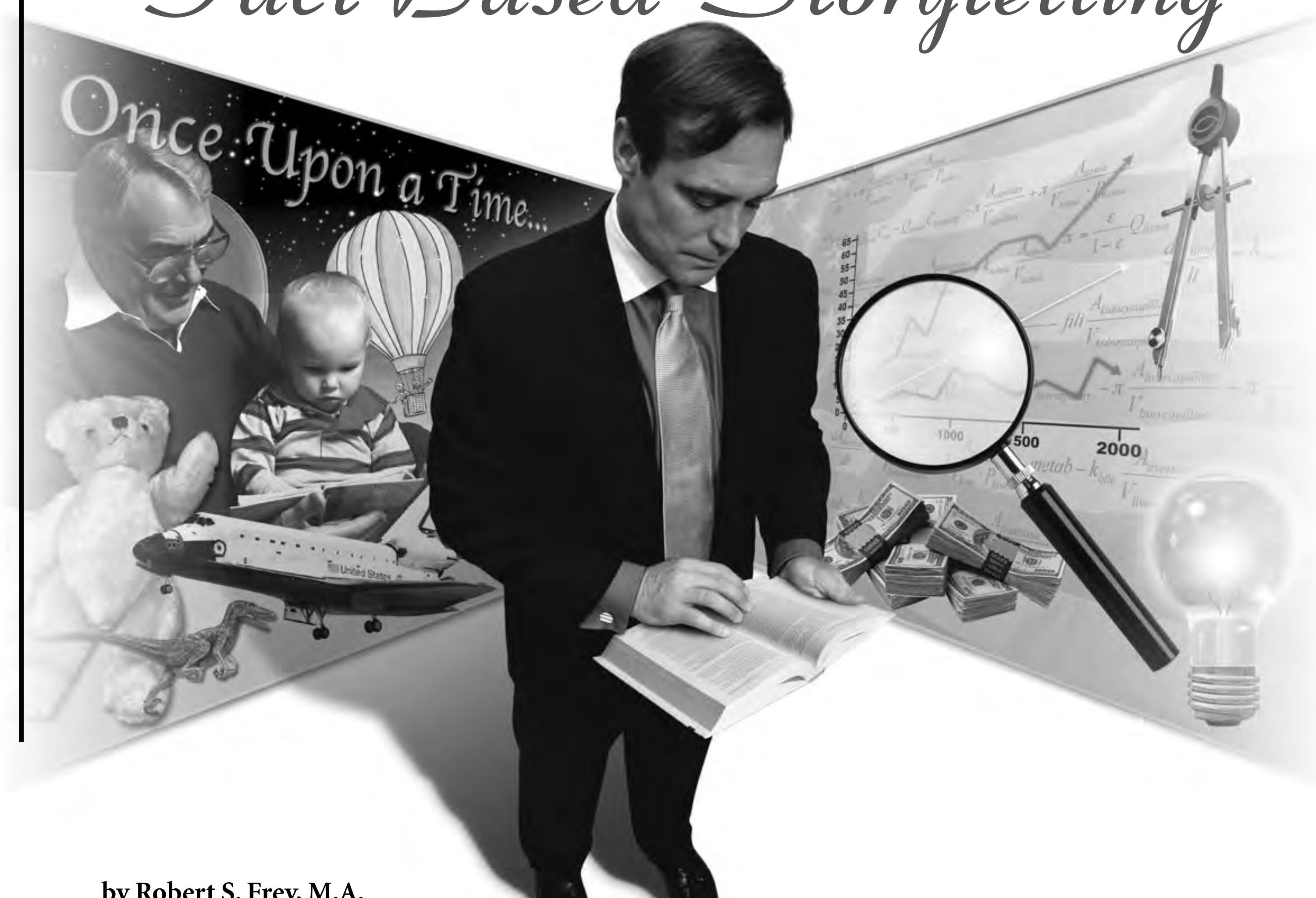
In this spirit, perhaps Pugh and Bacon will consider a print and/or online workbook for generating powerful proposals, something that both permanent and temporary proposal developers would welcome. Of course, every proposal process presents its own unique challenges and issues, and it would be impossible to identify or provide guidance on every situation that might arise. Ultimately, what a company is left with is the discretion and the will to apply the behavioral principles that *Powerful Proposals* champions.



Carefully identify your customer's Goals and Issues and marry them to your solution's Features, Benefits and Proof.

Article

Winning Federal Government Contracts Through *Fact-Based Storytelling*



by Robert S. Frey, M.A.

We adults tend to think of stories as fluffy artifacts from childhood. We assume that analytical is good, and anecdotal is bad.[1] *But current academic research and ongoing applications in corporate settings demonstrate something very different for business in general, and for the Federal Government market space in particular. Proposals fashioned as fact-based, knowledge-sharing stories generate positive difference between your company and your competitors. Stories infuse authenticity and uniqueness into otherwise very similar proposal documents. And stories help to convey passion, a critical ingredient in proposal success.*

Are you open to writing a brand new success story for your company?

Setting the Stage

In the Federal Government support services market space, people buy from people and people buy emotionally.[2] All contractual transactions are very personal, a point underlined by the growing importance of Customer Relationship Management, or CRM. For these and other critical reasons, fact-based storytelling should be considered *the* cornerstone of successful proposal development. Proposal storytelling builds in part on the concept of "Experiential Marketing," as articulated by Dartmouth's Kevin Lane Keller (2003, pp. 230-233) and Columbia Business School's Bernd Schmitt (1999, p. 53). Storytelling as an art form and practice—coupled with quantitative, technical, and scientific validation in the form of both *customer-centered* and *benefits-driven* narrative and graphics—constitutes an intensely powerful and highly cost-effective framework for developing and conveying proposal solutions. The real-world implications of this approach for today's and tomorrow's high-velocity business environment are substantive and tangible. **Effectively conveying proposal solutions can, in turn, lead to winning significantly more new and recompeted contractual business with the Federal Government.** And importantly, corporate organizational performance as it relates to business development, capture management, and the management of bid and proposal (B&P) dollars can be optimized.

The story is a "marketing strategy"— a "powerful tool to differentiate products and services." Once upon a time businesses could ignore story. Doing that today, though, could spell the end."

—Forbes magazine, Feb. 28, 2005

Currently, the total Federal Government acquisition spending level stands at a monumental $250B. The U.S. Government is indeed the world's largest buyer of goods and services. Competition for these federal contract dollars continues to grow more intense. For example, recently the Federal Government received 430 proposals from private industry in response to one high-profile Department of Commerce (DOC) services bid opportunity.[3] In today's extraordinarily competitive performance-based federal marketplace, the *delta*, or difference, between winning and coming in second borders on the microscopic. Given this level of competition, it becomes imperative for federal contractors of all sizes and levels of business maturity to apply proven processes to increase the win probability associated with their federal proposals.

Proposals are complex contractual and legal entities. In addition, they can be legitimately viewed as "knowledge products," that is, the synthesis of relevant technical, programmatic, past contractual performance, and costing knowledge coupled with a detailed understanding of government customers and stakeholders, industry competitors, specific government contracts and programs, and current and emerging structured processes[4] and technologies. Furthermore, proposals can correctly be considered as "sales products"—focused on completing the sale to the Federal Government that began during the marketing phase of a private-sector company's overall business development lifecycle for a specific government procurement opportunity.

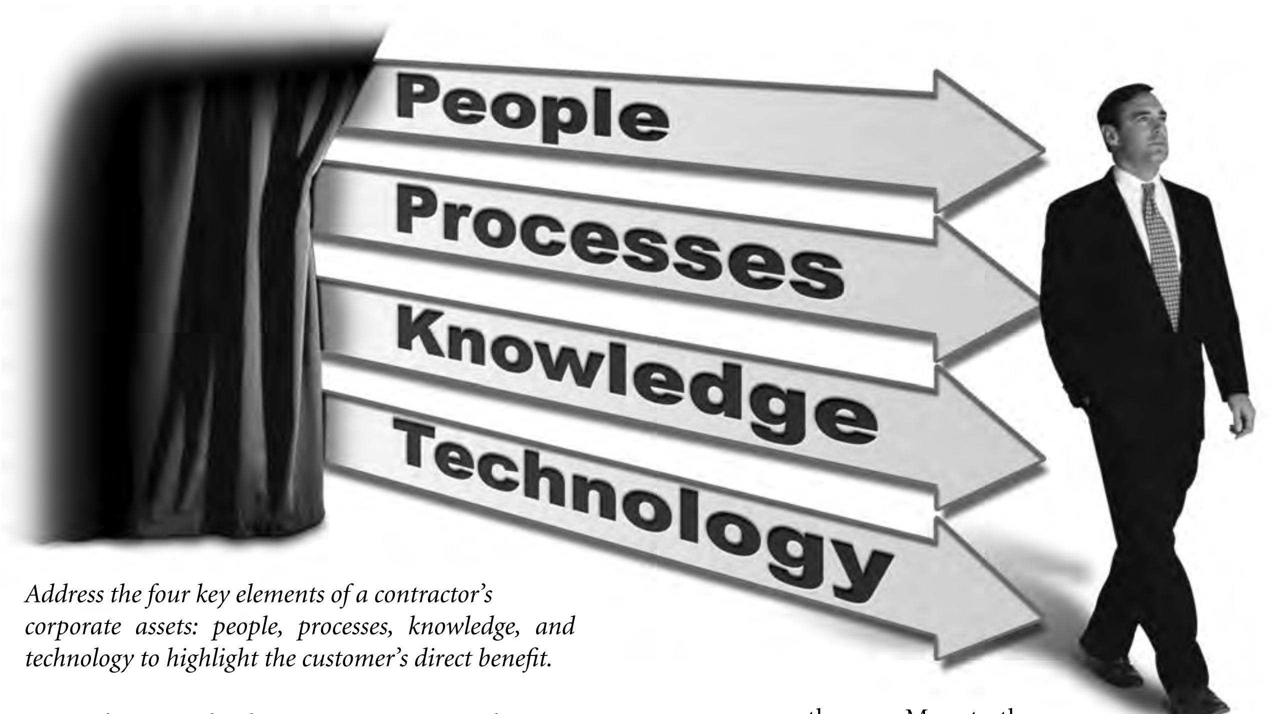
Fact-based storytelling is the cornerstone of successful proposal development.

Proposal storytelling is ideally suited for conveying complex, non-linear concepts, relationships, and solution sets—in effect, for sensemaking. As such, it is a powerful transformational tool that can be applied to increase knowledge transfer to the Federal Government through the medium of proposal documents.[5] Additionally, it can contribute directly to an increase in proposal win rate and, therefore, an enhanced revenue stream.

Enter Storytelling, Stage Right

This is precisely where the art of *fact-based storytelling* becomes so important as the tool of choice by which to convey solution sets. Solution sets are fact-based, quantitatively validated articulations of the framework in which a federal contractor will approach providing services and/or products to the Federal Government. This framework should address exactly how **four key elements** of a contractor's repertoire of enterprise-wide corporate assets—namely, **people**, **processes**, **knowledge**, and **technology**—will be deployed, implemented, and leveraged *to the direct benefit of the customer* given the contractor's understanding of the government's operational environment, program-specific requirements, agency-level mission, and decision makers' sentiments,[6] as well as the Request for Solution (RFS) or Request for Proposal (RFP) requirements.[7] The "customer" will most likely include the specific Federal Government agency, its users, customers, and stakeholders.

This is also precisely the point at which the majority of companies—*both large and small*—fail in their capture management and proposal development strategies and efforts. Compliance-oriented and process-driven capture management and proposal development approaches alone cannot and will not produce winning proposal documents and stellar oral presentations on a sustainable basis. The often-cited "answer-the-mail" model for



Address the four key elements of a contractor's corporate assets: people, processes, knowledge, and technology to highlight the customer's direct benefit.

responding to Federal Government RFPs and RFSs is necessary, but certainly **not sufficient** for long-term success and competitive advantage in the federal market space.

The winner is the prime, as evaluated by the customer, whose proposal is demonstrably different and superior when evaluated against the customer's stated and unstated criteria.

Fact-based storytelling is the *knowledge-transfer* and *communications mechanism* that constitutes the core of proposal solution development. Research suggests that sharing experiences through narrative (*i.e.*, storytelling) "builds trust," "transfers tacit knowledge," and "generates emotional connections" (Sole & Wilson).[8] Stories help create a shared experience between people[9]—in the case of proposals, between contractor and government evaluator. Solution development, in turn, refers to the critical activity of building and articulating fact-based *storylines* or *story arcs* that convey a federal contractor's specific approaches to providing meaningful, measurable, achievable, and risk-aware outcomes for its Federal Government customer. Robust solution sets must encompass such proposal areas as technical (Statement of Work [SOW], Statement of Objectives [SOO], or Performance Work Statement PWS]), program management, staffing approach, contract transition and phase-in, and past/present contractual performance. The storylines must draw together such major elements as "Understanding the Customer Environment," "Technical and Programmatic Approach," and "Measurable Outcomes/Value Proposition" in a manner that ensures continuity of major sales messages, or themes. More to the point, these storylines convey both sense and sensibility to the Federal Government customer. They convey the overall "experience" that your customer can expect during the actual performance of the contract that results from a company's winning proposal.

Embedding storytelling into the proposal process can help articulate and deliver meaningful and *positive differences* between a company and its competitors. Through well-articulated stories augmented with appropriate and quickly comprehensible graphics and photographic images, federal proposal evaluators as well as federal customers and stakeholders can come to understand "possible futures" (Sole & Wilson) that a company's suite of solutions will provide. Evaluators can visualize how doing business with a given company will advance their federal agency's mission and programs. They can also see how that company will advance their own careers. As the U.S. Government migrates toward more performance-based federal pay[10] for its leaders, effective and efficient acquisition decisions and contractual oversight in accordance with the President's Management Agenda (PMA)[11] are becoming more critical to the success of federal executives.

Fact-based storytelling is effective in building trust and in generating emotional connections with your customer.

In your proposal story, your company becomes the "hero"; your customer and her mission is the important "cause." In your story, you focus on the "people you have helped," "the money you have saved," "the schedules you have met," your "deliverables that have exceeded expectations," and the "effective innovations that you have implemented."

Conveying stories can convey one's trust-worthiness, as well as signal one's trust in others.

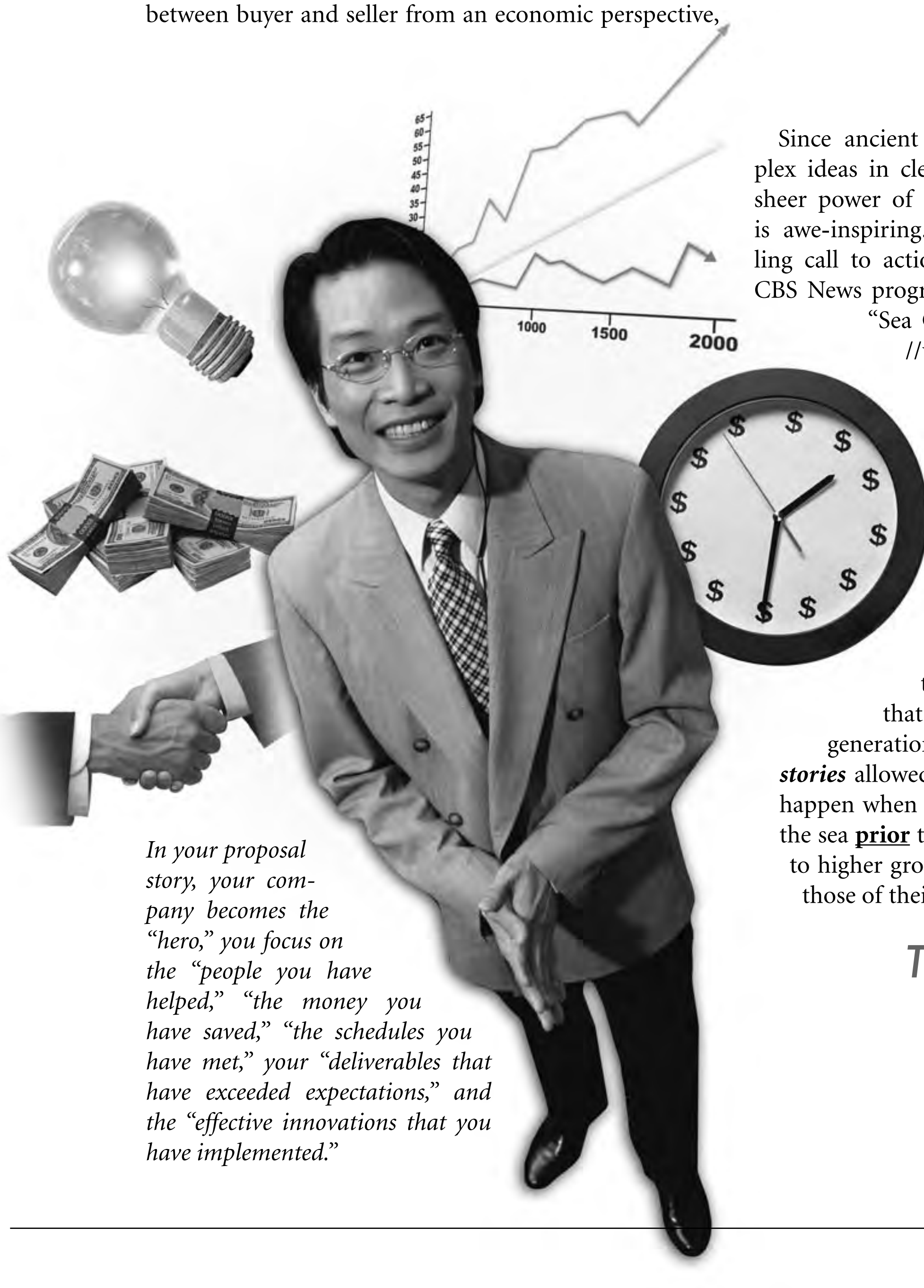
—Dr. Deborah Sole, Harvard University, 2002

Foundational Basis of Storytelling

Stories have the ability to "touch people intellectually, physically, emotionally, and spiritually" (Silverman, 2004, p. 48) in ways that a "just the facts," linear approach to communication (Tyler, 2004, p. 121) is unlikely to do. New Mexico State University's David M. Boje[12] asserts that "storytelling is the preferred sensemaking currency of human relationships . . . ." (Boje, 1991, p. 106). Just as dollar bills and coins are valued as a means of exchange between buyer and seller from an economic perspective, so too are stories the fundamental means of exchange in human interactions. *Why?* Because stories are "elegantly simple" and "streamlined" (Sole & Wilson). Stories are also "portable" and "tell-able"[13] (Sole & Wilson). Knowledge-sharing stories such as those embedded into proposals offer the government evaluators a "surrogate experience" (Sole & Wilson). It allows the evaluators to envision as well as feel the positive "experience" described in the proposal narrative—the positive "experience" of responsive support, timeliness of service delivery, problem-solving capacity, and proactive followthrough on corporate commitments. The deep sense of *peace of mind* that comes from validated customer satisfaction for other government customers on programs of similar size, scope, and complexity.

The sheer power of stories in both oral and written form is awe-inspiring. Stories can function as a compelling call to action.

Since ancient times, stories have transmitted complex ideas in clear and easily understood terms. The sheer power of stories in both oral and written form is awe-inspiring. Stories can function as a compelling call to action. On Sunday, March 20, 2005, the CBS News program *60 Minutes* aired a segment called "Sea Gypsies See Signs in the Waves" (http://www.cbsnews.com/stories/2005/03/18/60minutes/main681558.shtml). Unlike tens of thousands of Thais, Sri Lankans, and Indonesians who perished in the devastating tsunami that overwhelmed Southwest Asia in December 2004, the Moken people—who live precisely where the tsunami hit the hardest—suffered no casualties at all. *Why?* Because of verbal and symbolic stories about the sea and its patterns and behaviors that have been passed from generation to generation among the Moken people. These very ***stories*** allowed them to ***envision*** what was about to happen when they observed the profound changes in the sea **prior** to the tsunami. They were able to move to higher ground in time to save their own lives and those of their children.



In your proposal story, your company becomes the "hero," you focus on the "people you have helped," "the money you have saved," "the schedules you have met," your "deliverables that have exceeded expectations," and the "effective innovations that you have implemented."

There is a pivotal dynamic associated with proposal storytelling.

Exhibit 1. A three-part dynamic relationship brings stories to life—ready to influence sentiment and generate action.

Research suggests that "storytelling is far more convincing...than rational arguments, statistics, or facts."

As illustrated in Exhibit 1, there is a pivotal dynamic associated with proposal storytelling (Tyler, 2004, p. 153)—the important connectivity among the *story*, the *storyteller*, and the *reader* (in the case of written proposals, and the *listener*, in the case of oral presentations associated with proposals).

Storytelling puts learning into context through specific examples that also demonstrate some of the outcomes. Knowledge + Context + Benefits = Greater Relevance + Greater Probability of Learning.[14] In addition, stories "act as maps, helping people make sense of unfamiliar situations by linking them to familiar ones, making the unexpected expected, hence manageable" (Digh, 2001).[15] In the proposal arena, contract transitions present unexpected situations for federal customers. Will there be full continuity of operations? Will the intellectual capital now resident on my program be retained? Will my requirements continue to be met? All of these issues translate into increased RISK. Fact-based stories that illustrate how your company successfully handles contract transition will go a long way to assuage your federal customer's concerns and therefore mitigate perceived risk. Your story should include as many of the following elements as are applicable for, and representative of, your transition experience:

- Transition leadership
- Incumbent recruiting success
- Development of performance metrics in conjunction with the customer
- Subcontract agreements finalized
- Security clearances transferred
- Facility leases negotiated
- Government-furnished equipment (GFE) and contractor-furnished equipment (CFE) inventoried
- Training conducted

Stories are "natural units of memory" that allow us to encapsulate complex ideas and relationships in easily remembered and retrievable form.

Research suggests that "storytelling is far more convincing . . . than rational arguments, statistics, or facts" (Kaufman, 2003, p. 11). "Assimilating stories involves both the right and left sides of the brain working in partnership to process, retain, and then apply the story" (Tyler, 2004, p. 128). However, proposal stories must also answer the questions, "How and why is this solution or approach of direct benefit to the Federal Government customer?" and "Why should the federal agency select my company and not my competitor?"

Trust needs a story to sustain it—a meaningful story that inspires belief in you and your company.

Stories are “natural units of memory” that allow us to encapsulate complex ideas and relationships in easily remembered and retrievable form. Fundamentally, people don’t want *more* information. In this Information Age, they are up to their eyeballs in data and information. They want **trust**—trust in you, your goals, your success, in the story you tell. Trust needs a story to sustain it—a *meaningful* story that inspires belief in you and your company. A story that renews hope that your ideas do indeed offer what you promise.[16]

Storytelling Applied Within Federal Agencies

The Federal Government itself recognizes the value and power of storytelling. Take NASA, for example. NASA’s Academy of Program and Project Leadership (APPL), under the leadership of Dr. Edward J. Hoffman and Dr. Alexander Laufer, helps our space agency’s managers and project teams accomplish today’s missions and meet tomorrow’s challenges. *How?* In part through a Knowledge Sharing Initiative that includes *ASK* Magazine. The **stories** that appear in *ASK* are written by the “best-of-the-best” project managers, primarily from NASA, but also from other government agencies and industry. These stories contain genuine “nuggets” of knowledge and wisdom that are transferable across projects.

Imagine your proposal is a mirror. A mirror in which your customers can see themselves, their career, their staff, their program, and their agency’s mission.

It is precisely these same kinds of “nuggets” that bring proposals to life. They make the solutions, experience, knowledge, and lessons learned from one set of circumstances on a given program ***transfer*** to the new program being competed.

Best-of-Breed Implementation Approaches

Imagine that your proposal is a mirror. A mirror in which your customers can see themselves, their career, their staff, their program, and their agency’s mission. In order for government evaluators to ***see*** and ***place*** themselves into the fact-based stories contained in your proposal, you will have to leverage the marketing intelligence that your company’s Business Development staff gained from face-to-face interactions and professional relationships nurtured and sustained over time. You will need to engage your readers and listeners in your stories (see Exhibit 1), and the stories must be authentic.

Use storytelling to put your customer’s fears over transition to rest. Make sure to answer all of their major hot-button issues.

Important and Highly Relevant Questions

Ask yourself these important and highly relevant questions as you build your fact-based proposal stories.

Q: Are the stories contained in your proposal documents relevant to the experiences, hopes, fears, and biases of the government evaluators, the human beings who will be reading and responding to your proposal?

Q: Will the readers of your proposal be able easily to connect the people, events, and plot described in your proposal stories to their current requirements, work, and interests?

Q: Are your stories rich in details (Tyler, 2004, p. 79) that convey authenticity and reliability, and also establish the context for the events and outcomes that you describe? Will these stories engage and capture the evaluators' imaginations?

Q: Are your stories engaging? Do they reach out and establish human-to-human contact with the folks who are evaluating your company's proposal?

"The cost-benefit ratio of storytelling can be terrific."

—Dr. J.A. Tyler, 2004

Effective proposal stories build on several important elements (as adopted from Tyler, 2004, p. 92):

- Characters (who?)
- Action and interaction (what?—in effect, the "plot")
- Setting/context (when? and where?)
- Conflict or tension (why?)
- Pleasant surprise
- Resolution of the conflict or tension (how?)

Taglines in oral proposal presentations are one example of how the repetition tool draws listeners further into the presentation storyline.

Consider the example of a powerful proposal story on the next page.

Finally, **repetition** is an important structural tool that facilitates recall of the storyline. Tag lines (also called "take-aways" or "bumper stickers") in oral proposal presentations (as in the example on page 58) are one example of how the repetition tool draws listeners further into the presentation storyline.

Staffing levels with this contractor increased by a factor of 12.8 to nearly 1,800; revenues increased by a factor of 20.6 to $320M.

Empirical Validation of the Proposal Storytelling Paradigm

The validity of this innovative fact-based storytelling approach for proposal development has been established empirically during the past 6½ years. Staffing levels within this now-graduated 8(a) federal support services contractor increased by a **factor** of **12.8** to nearly 1,800 within that period, and revenues increased by a **factor** of **20.6** to $320M. In addition, the scholarly literature review also provides a defensible theoretical basis for the foundational planks of my storytelling approach.

A Powerful Proposal Story

During the course of many face-to-face meetings both this year and last, we listened carefully to the strengths, constraints, and future direction of your organization's operational environment. We recognize that tomorrow's enterprise success factors have changed from technology-centric ones to those premised upon "business + planning," "business + security," "business + enterprise architecture," and "business + capital planning."

This is precisely where Mr. Bill Williams ***(who?)***, our Team's fully accountable, on-the-ground Program Manager, will be of significant benefit to your entire organization.

Three years ago ***(when?)***, Mr. Williams spearheaded a team of 135 technical and business-savvy professionals which faced the major challenge of optimizing the return on investment (ROI) of one critical defense agency's information technology (IT) portfolio ***(the plot)***. And that was only one of the major challenges.

Another was that this agency's IT assets were geographically dispersed throughout four states in the Southwest United States ***(where?)***.

With tremendous enthusiasm and endurance, Mr. Williams and his management team worked hand-in-hand with their government counterparts to increase ROI by 8% and drive total cost of ownership (TCO) down by 11% over the course of 2 years ***(how?)***.

In fact, Mr. Williams and his team worked 65% of all weekends and holidays during that time period to ensure that all performance requirements were met fully.

Was our customer pleased? The 99.9% award fees are solid evidence that they were. Because Mr. Williams' role on that highly successful contract is now complete, he will bring to bear his passion, programmatic knowledge, and people leadership skills to support your important program requirements and your Agency's mission. By the way, Mr. Williams and his core management team received a Group Achievement Award for their outstanding support of our defense customer.

But Mr. Williams was not there the day the Award was made ***(surprise)***. He was on site in Charleston, South Carolina, making sure that an extensive IT asset inventory process was being conducted in accordance with FAR 45 and with new DoD property management guidelines.

Why that level of programmatic oversight? Because property management takes on added criticality in an operational environment with aging, hard-to-replace, and extremely expensive equipment located across thousands of square miles.

You can look forward with confidence to this level of above-and-beyond customer care. Expect it. We will deliver it.

Repetition, repetition, repetition! Use taglines in your oral presentations to further emphasize your message and draw your audience into your story.

> *When people ask me what I do for a living, my response is that I'm a "fact-based storyteller."*
>
> *Because people buy from people, and stories are the most foundational form of human communication, it follows that stories—when crafted carefully and applied appropriately—constitute a powerful communications tool for winning business through written proposals and oral presentations.*
>
> *—Robert S. Frey*

References Cited

Boje, D.M. (1991). The Storytelling Organization: A Study of Story Performance in an Office-Supply Firm. Administrative Science Quarterly, Vol. 36, pp. 106-126.

Denning, S. (May 2004). Telling Tales. Harvard Business Review, Vol. 82, pp. 122-129.

Digh, P. (August 2001). Global Success Through Storytelling: A Key to Understanding Culture. ASAE Global Link. Retrieved from http://www.asaenet.org/asae/cda/index/1,1584,PID16052,00.html

Kaufman, B. (April/May 2003). Stories that Sell, Stories that Tell. The Journal of Business Strategy, Vol. 24, pp. 11-15.

Keller, K.L. (2003). Strategic Brand Management: Building, Measuring, and Managing Brand Equity (2nd ed.). Upper Saddle River, NJ: Prentice Hall.

Pink, D.H. (February 28, 2005). A Story Goes With It. Forbes, Vol. 175, p. 30.

Schmitt, B. (1999). Experiential Marketing. Journal of Marketing Management, Vol. 15, pp. 53-67.

Silverman, L.L. (November 2004). Strategic Storytelling: A Timeless Tool Makes Its Way into Association Management. Association Management, Vol. 56, pp. 41-44, 46, 48.

Simmons, A. (2001). The Story Factor: Secrets of Influence from the Art of Storytelling. Cambridge: Perseus Publishing.

Sole, D. (April 2002). Sharing Knowledge Through Storytelling. Learning Innovations Laboratories, Harvard University Graduate School of Education. Retrieved from http://www.providersedge.com/docs/km_articles/Sharing_Knowledge_Through_Storytelling.pdf

Sole, D. & **Wilson**, D.G. Storytelling in Organizations: The Power and Traps of Using Stories to Share Knowledge in Organizations. Retrieved from http://lila.pz.harvard.edu/_upload/lib/ACF14F3.pdf

Tyler, J.A. (April 26, 2004). Strategic Storytelling: The Development of a Guidebook for HRD Practitioners Implementing Storytelling as a Business Strategy for Learning and Knowledge Transfer. Unpublished doctoral dissertation, Teachers College, Columbia University.

(Footnotes)

[1] Stephen Denning, former Program Director of Knowledge Management at the World Bank.

[2] The fact that emotions are embedded deeply within the federal acquisition process is borne out time and again, as evidenced by the enduring and widespread negative im-

pact of poor technical performance, schedule control, or cost containment; lack of corporate visibility during the course of a contract lifecycle; and interpersonal issues and challenges among contractor staff and their government counterparts, to list but several issues. These *perceived* or *actual* issues often color and calibrate government decision makers' sentiments regarding a particular contractor during the proposal evaluation and award determination processes.

[3] This DOC bid opportunity was the COMMerce Information Technology Solutions (COMMITS) Next Generation (NexGen) Government-Wide Acquisition Contract (GWAC). This 10-year GWAC vehicle has a combined ceiling of $8B. Ultimately, 51 companies across 3 size tiers were selected for award.

[4] Structured processes include ISO 9001:2000; Carnegie Mellon's Software Engineering Institute (SEI) Capability Maturity Model Integration (CMMI) processes; Information Technology Infrastructure Library (ITIL) standards, which are increasingly popular British standards for managing information technology services; and Institute of Electrical and Electronics Engineers (IEEE) standards.

[5] Increasingly, proposals are provided to the Federal Government in electronic form through a Web-based business opportunity portal, or BOP site, as well as via e-mail or CD-ROM. Often both hardcopy documents and electronic files in MS-Word or Corel WordPerfect and PDF format are required.

[6] These are the "unstated criteria." "Customer sentiment" is a term employed by proposal expert, Mr. Hy Silver.

[7] Conversely, these are the "stated criteria."

[8] Both Sole and Wilson are with Harvard University.

[9] See http://www.bizstorytellers.org/1a_Storytelling.htm

[10] See the report by the Human Resources Management Panel of the National Academy of Public Administration entitled, "Recommending Performance-Based Federal Pay," (May 2004), http://www.napawash.org/Pubs/Broadbanding5-04.pdf. Also see Stephen Barr, "Complaints About NASA Raises Follow Switch to Performance-Based System," Washington Post, March 2, 2005.

[11] Launched in August 2001, the PMA (http://www.whitehouse.gov/omb/budget/fy2002/mgmt.pdf) reflects President George W. Bush's vision for government reform, which is guided by three important principles: (1) citizen-centered, (2) results-oriented, and (3) market-based. The PMA was launched as a strategy for improving the management and the performance of the U.S. Federal Government. Importantly, federal agencies have been held publicly accountable for adopting the disciplined approaches of the PMA through a government-wide color-coded scorecard system (GREEN—YELLOW—RED). GREEN indicates that a given agency has met all of the established Standards of Success under the PMA, or that that same agency's implementation is proceeding according to plan.

[12] Dr. Boje is Professor of Management in the College of Business Administration & Economics at New Mexico State University in Las Cruces, NM.

[13] Scholars would refer to this aspect of stories as their capacity to be verbally or orally "mediated" (Sole & Wilson).

[14] This qualitative "equation" was presented in a Web-based article entitled, "Tales of the Unexpected—The Journey of a White Paper" (2001), which was prepared by the Department of Trade and Industry (DTI) in the United Kingdom.

[15] Patricia Digh is one of the authors of *Global Literacies: Lessons on Business Leadership and National Cultures* (Simon & Schuster, 2000), a book that was selected by Fortune magazine as a "Best Business Book" for 2000.

[16] Adopted and modified from Annette Simmons. *The Story Factor: Inspiration, Influence, and Persuasion Through Storytelling.* Jonesborough, TN: International Storytelling Center. http://www.storytellingcenter.net/resources/articles/simmons.htm

***Robert S. Frey, M.A.**, serves as the Vice President of Knowledge Management and Proposal Development for RS Information Systems, Inc. (RSIS®). He brings a proven 18-year track record of proposal winning. During his professional career, he has successfully managed proposals that have resulted in more than $1.25B of funded revenue. That record is authenticated by a sustained 66% win rate with RSIS during the past 6 years in the highly competitive information technology (IT) marketplace. In 2004 alone, RSIS crafted 52 proposals and had a win rate of 68.29%. Mr. Frey has published four editions of a well-received book on proposal development for small businesses entitled, Successful Proposal Strategies for Small Businesses: Using Knowledge Management to Win Government, Private-Sector, and International Contracts (Boston and London: Artech House, 2005).* **The Fourth Edition of this volume is available through www.Amazon.com or www.artech-house.com.**

Mr. Frey teaches proposal development and knowledge management at UCLA in Westwood, California, as an Adjunct Professor. He is a regular contributor of business and proposal-related articles to Corporate Corridors magazine and the Kansas City Small Business Monthly. Mr. Frey holds a B.S. degree in Biology and a Master's degree in History. In May 2005, he will earn his Master of Science in Management (MSM) with a focus in Marketing through the University of Maryland.

APMP®

CORPORATE SPONSORS

SM&A™
Success Makers

Shipley Associates™

PRAGMATECH™ SOFTWARE

LOCKHEED MARTIN

BOEING

NORTHROP GRUMMAN

24 Hour Company

CACI
EVER VIGILANT™

TETRA TECH EC, INC.

mimeo.com®
Your Online Print Center

BAE SYSTEMS

EDS

QND

THE Waverly GROUP

CSC

APPIAN

INDEX OF ARTICLES

Note: Archive articles are posted in PDF format at the APMP Website, www.apmp.org.

Fall/Winter 2004

Announcement	APMP	*APMP 2005 Annual Conference*
Announcement	APMP	*Welkom! Dutch Chapter of APMP*
Announcement	APMP	*Attention All Editors and Proofreaders!*
Article	Bettinger, Joan	*Creating a Proposal Services Department*
Trends & Views	Smith, Russell	*Proposal Departments: Whether to Use Permanent Staff or Consultants*
Commerce-Products	Jolly, Colleen	*Resources for Women Proposal Professionals*
Review-Book	Winton, David	*Brunellschi's Dome: How a Renaissance Genuis Reinvented Architecture (by Ross King)*
Review-Book	Paskun, Ali	*Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation! (by Lynne Truss)*
Review-Book	Paskun, Ali	*Walking the Tightrope: Balancing Family Life and Professional Life (by Dr. Tom Barrett)*
To Wit	Sokolow, Jayme A., Ph.D.	*The Proposal Gene*
Sponsorship	APMP	*APMP Corporate Sponsorship*

Spring/Summer 2004

Article	Jolly, Colleen	*Designing a Winning Proposal*
Article	Sokolow, Jayme A., Ph.D.	*How Do Reviewers Really Evaluate Your Proposal? What the Cognitive Science of Heuristics Tells Us About Making Decisions*
Article	Stewart, John Parker & Stewart, Daniel	*Orals Coaching: The Secret Weapon for Winning Contracts*
Award	APMP	*The APMP Fellows Award*
Call for Papers	APMP	*APMP 2005 Annual Conference Call for Presentations*
Review-Book	Paskun, Ali	*The Capture Management Life-Cycle (by Gregory A. Garrett and Reginald J. Kipke)*
Review-Book	Paskun, Ali	*Changing Minds: The Art and Science of Changing Our Own and Other People's Minds (by Howard Gardner)*
Sponsorship	APMP	*APMP Corporate Sponsorship*

Fall/Winter 2003

Article	Parker, Richard A., Duffy Eletha L., Esq., Williams, Jon	*Security: The Essential Partner in Proposal Management*
Book Excerpt	Sant, Tom	*Why the Inuit Hunt Whale and Other Secrets of Customer Behavior*
Case Study	Shoulders, Reba L.	*Winning Business with International Lotteries: SGI Discovers It's Not All Fun and Games*
How To	Sokolow, Jayme A., Ph.D.	*Developing a Performance-based Work Statement: Morph Yourself Into a Performance-based Expert NOW Before It's Too Late*
Profile	Green, R. Dennis	*Professor of Persuasion– Dr. Tom Sant*
Review-Book	Hannigan, Joanna	*Thinking for a Change: 11 Highly Successful People Approach Life and Work (by John C. Maxwell)*
Review-Book	Sheffler, Cathy	*The Human Organization of Time: Temporal Realities and Experiences (by Allen C. Maxwell)*
Review-Book	Williamson, Monica	*Winning Behavior: What the Smartest, Most Successful Companies Do Differently (by Terry R. Bacon and David G. Pugh)*
To Wit	Green, R. Dennis	*Buzzword Bingo*

Spring/Summer 2003

Article	Landgren, Theodora	*Successful Proposal Translation Strategies: Proven Guidance for Approaching Multi-Language Bid*
Article	Munger, Roger, Ph.D.	*Information Design: Strategies to Make Your Proposal Reader Friendly*
Article	Williams, Jon	*Publish and Be Damned? The Powers and Perils of Pre-written Content*
Focus on Basics	Garrett, Gregory A. & Kipke, Reginald J.	*A Capture Management Life Cycle Primer: Learning to Dance with Customers*
Profile	Green, R. Dennis & Meehan, John	*David A. Franke – Champion for Air Force Acquisition Excellence*
Profile	Green, R. Dennis & Meehan, John	*Alan Goldberg, An Inquiry into Effective Acquisition – and Standing the Test of Time*
Review-Book	Hannigan, Joanna	*Leap. A Revolution in Creative Business Strategy (by Bob Schmetterer)*
Review-Book	Hannigan, Joanna	*Execution, the Discipline of Getting Things Done (by Larry Bossidy and Ram Charan)*
Review-Book	Smith, Maggie	*Good Work, When Excellence and Ethics Meet (by Howard Gardner, Mihaly Csikzentmihalyi & William Damon)*
Survey Report	Elder, John & Austin, Rick	*Productivity, Sales Gains Reported by Users of Proposal Automation Software*
To Wit	Sokolow, Jayme A., Ph.D.	*The Proposal Professional as Primate: Lessons from the Jungle*
Trends & Views	Frey, Robert S.	*Beyond Compliance: Towards Solution and Storyline Development as Valuable Proposal Management Core Competencies*
Web	Elder, John & Paskun, Ali	*Proposal Resources on the Web*

Fall/Winter 2002

Capture Mgmt	Bacon, Terry R.	*Creating Preference*
Methodology	Nutt, Howard	*Business Development Capability Maturity Model and Proposal Professionals*
Packaging	Frey, Robert S.	*Packaging and Managing Proposal Information and Knowledge Effectively*
Profile	Green, R. Dennis	*Looking Back with Edward J. Velton*
Profile	Green, R. Dennis	*Always In Motion – Patty Nunn*
Questions	Herndon, David & Ransone, R.	*Why, When, and How to Ask Questions on Government Solicitations*
Review-Book	Gaither, Joanna Hannigan	*Accidental Magic: Wizard's Techniques for Writing Words (by Roy H. Williams)*
Review-Book	Spangler, Barry	*Proposal Development – How to Respond and Win the Bid (By Bud Porter-Roth)*
To Wit	Fields, Barry	*When Par Isn't Good Enough*
Training	Lownie, B.J.	*Improving the Proposal Team (Improvisional Theatre Techniques)*
Training	Wilson, Greg	*Proposal Training for Organizations*
Trends & Views	Devore, Chuck & Moler, T.	*US DoD B&P on the Rise: What Does It Mean?*
Writing	Sokolow, Jayme	*Taking the Arrogance Out of Proposal Writing*

Spring/Summer 2002

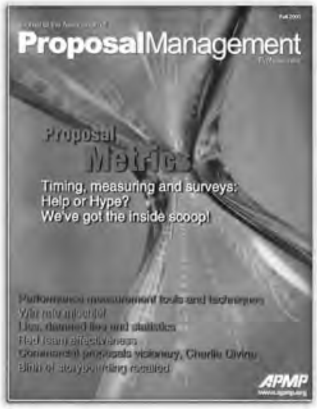
Capture Mgmt	Pugh, David G.	*A Bidder's Dozen: Golden Rules for Winning Work*
Leadership	Amrhein, Tom	*Failure to Lead, Leads to Failure: The Art of Proposal Management*
Philosophy	Sokolow, Jayme	*Fredrich Nietzsche? For Proposal Professionals?*
Production	Kelman, Suzanne	*Proposal Production: A Primer on Quality Drivers, Lead Times, and Production Task Scope*
Products-Commerce	Wilson, Greg	*Developing 'In-house' Proposal Tools*
Profile	Green, R. Dennis	*The Proposal Industry Council*
Review-Book	Parks, Jennifer	*Sales Proposals Kit for Dummies (by Bob Kantin)*
Review-Book	Peterman, Todd	*Shipley Associates Proposal Guide for Business Development Professionals (by Larry Newman)*
Review-Book	White, Mark	*Win Government Contracts for Your Small Business (by DiGiacomo and Kleckner)*
Security	Cavanaugh, Tom	*Computer Security from a Proposal Perspective*
Security	Rhea-McKenzie, Denise	*Proposal Security 101: Basics of Managing Competition Sensitive Data*
Service-Learning	Munger, Roger	*Workplace-Classroom Collaborations [Internships]: A Role for Service Learning in Proposal Development*
To Wit	Gregory, Eric	*Reeling in the Big Ones (Lessons from Fishing)*

Spring 2001

Electronic Procurement	Irby, Gay T.	*The Electronic Procurement Revolution [NASA]*
History	Sokolow, Jayme	*Nineteenth Century Contracting Foibles in the Building of America's Canals*
How-To	Eassom, Dick	*MS Word Power*
How-To	Herndon, David H.	*RFP Response Mapping and Compliance Identification*
Products-Commerce	Wilson, Greg	*RFP Master Product Demonstration Review*
Profile	Green, R. Dennis	*Michael J. Ianelli – A Business Development Virtuoso*
Recruitment	Siskind, Jon	*Bidding for the Best and Brightest: Recruiting and Hiring Top Quality Proposal Professionals*
Review-Book	Bennington, Amy	*Government Proposals: Cutting through the Chaos (by Rebecca Shannon)*
Review-Book	Bielak, Susan	*Successful Proposal Strategies for Small Businesses, 2nd Ed. (by Robert Frey)*
Telecommuting	Greer, Sherri R.	*Telecommuting and the Proposal Manager*
Trends & Views	Dean, Roger	*Demise of Dinosaurs*
Web	Ognibene, Peter J.	*Net-working the Web*

Fall 2001

Best Value	Dempsey, David B.	*Best Value Proposals Under OMB Circular A-76*
Best Value	Mickaliger, Michael J.	*Best Value Contracting: Selection by Perception*
Cost Control	Turnbull, Duane	*Tips to Cutting Proposal Costs*
Cost Proposals	Dean, Roger	*Dollars and (Non)Sense [Trends & Views]*
Cost Proposals	Newman, Larry	*Developing Cost Price Data [Proposal Guide Excerpt]*
Cost Proposals	Oyer, Darrell J.	*Developing Cost Estimates for Proposals to the Government [Book Excerpt]*
Cost Proposals	Snodgrass, Alan	*CAIV: Cost As an Independent Variable*
Nonprofits	Sokolow, Jayme	*Nonprofit Lessons for the Business World*
Products-Commerce	Wilson, Greg	*Proposal Automation Products – Product Survey*
Profile	Green, R. Dennis	*Perpetual Youth: Story of Lou Robinson and Gene Dawson*
Review-Book	Casey, Ann Marie	*The Strategy and Tactics of Pricing: A Guide to Profitable Decision Making (by Nagle & Holden)*
Review-Book	Napolitano, Jennifer C.	*Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits (by Barbato & Furlich)*
Review-Book	Parks, Jennifer	*The Great Wave: Price Revolutions and the Rhythm of History (by David Hackett Fischer)*
To Wit	Mar, Jen	*Proposal Phobias: Revelations and Cure*

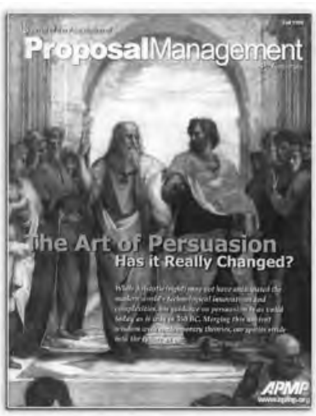


Spring 2000

Case Study	Mesing, Paul	*Metrics at NCR's Proposal Center*
Case Study	Salamida, Marietta	*Process Improvement Methodology [Lockheed Martin Federal Systems]*
History	Starkey, Walter S.	*The Beginnings of STOP Storyboarding and the Modular Proposal*
Metrics	Dean, Roger	*Win Rate Mischief [Trends & Views]*
Metrics	Freeman, Rich & Freeman, James S.	*A Metrics Toolbox: Scoring System to Help Evaluate Proposals and Processes*
Metrics	Freeman, Rich & Freeman, James S.	*Proposal Writing Metrics*
Metrics	Martens, Mark	*Performance Measurement and Outsourcing [Informed Comment]*
Metrics	Sokolow, Jayme	*Lies, Damned Lies, and Statistics: The Use and Abuse of Numbers*
Products-Commerce	Wilson, Greg	*A Competitive Intelligence Product Review: Knowledge Works (from Cipher)*
Profile	Green, R. Dennis	*Divine Intervention [Charlie Divine]: Leadership in New Commercial Proposal Paradigm*
Red Teams	Herndon, David H.	*Using Red Teams Effectively – Focus on Basics*
Review-Book	Beeler, Steve	*Technical Writing: A Practical Approach (by William S. Pfeiffer)*
Review-Book	Bragaw, Robert	*American Management Association – Self Development for Success Series*
Review-Book	Giguere, Paul	*Proposal Writing: The Art of Friendly Persuasion (by W. S. Pfeiffer and C.H. Keller, Jr.)*

Fall 2000

Case Study	Miller, Robert L.	*An Architectural Proposal in the Modern Vein [An A/E/P Procurement]*
Case Study	Rhea-McKenzie, Denise	*A Virtual Private Network Case Study [Litton PRC Defense Systems]*
Electronic Procurement	Jacobs, Barry E.	*How Electronic Handbooks are Changing the Way Federal Agencies Manage Grants and Contracts [DOJ & NASA]*
Electronic Procurement	Nunn, Patricia A.	*Federal Electronic Procurement, Past and Future: Feeding 'Need for Speed'*
History	Sokolow, Jayme	*Pioneers in Virtual Reality: From Ancient Pompeii to Modern Baseball*
International	McFarlane, Eileen Luhta	*Developing International Proposals in a Virtual Environment: A Cultural and Personal Perspective*
Products-Commerce	Dickson, Carl	*Web Technology – Trends to Watch*
Profile	Green, R. Dennis	*Spotlight on Marianne Gouveia*
Profile	Rider, Rick & Green, R. Dennis	*Steve Shipley: CEO, Shipley Associates, Inc.*
Review-Book	Maddry, Lisa M.	*How to Write a Statement of Work -4th Ed. (by Peter S. Cole)*
Review-Book	Parks, Jennifer	*The Elements of Technical Writing (by Gary Blake and Robert Bly)*
Small Business	Davis, John	*So What is SBIR/STTR?*
Trends & Views	Dean, Roger	*Virtual Teaming – The Proposal Siren Song*
Writing	Green, R. Dennis	*Web Writing – Using the Write Brain*



Spring 1999

Graphics	Horton, William & Horton, Katherine	*Picture-Perfect Proposals: Putting Visual Literacy to Work*
Leadership	Green, R. Dennis	*Leadership as a Function of Power – Gary Yukl Research*
Orals/Pres.	Leech, Thomas	*The "Murphy Foiler" Checklist*
Orals/Pres.	Leeds, Dorothy	*Conquer Speaking Faults and Succeed as a Team*
Orals/Pres.	Pease, Gregory W.	*Persuasive Oral Proposal Presentations*
Persuasion	Dean, Roger	*The More Things Change, the More They Stay the Same [Trends & Views]*
Persuasion	Durack, Katherine T.	*It All Comes Out In The Wash: Persuasion in Technical Proposals – 19th C. Washing Machine Applications [Patent]*
Persuasion	Sokolow, Jayme	*The Darker Side of Persuasion: Stanley Milgram's Experiments on Obedience to Authority*
Products-Commerce	Green, R. Dennis	*Proposal Products: Another Great Proposal Automation Tool*
Products-Commerce	Nix-Karnakis, Nancy L.	*Proposal Room Wall Hanging Systems – Tailor to Suit*
Profile	Green, R. Dennis	*Profile – Steve Myers: Chairman and CEO, SM&A Corporation*
Review-Book	Giguere, Paul	*Franklin Covey Style Guide for Business and Technical Communication, 2nd Ed.*
Review-Book	Sokolow, Jayme	*Visual Explanations: Images and Quantities, Evidence and Narrative (by Edward R. Tufte)*
Review-Book	Sokolow, Jayme	*Envisioning Information (by Edward R. Tufte)*

Fall 1999

Competitive Intelligence	Prescott, John E.	*The Evolution of Competitive Intelligence: Designing a Process for Action*
History	Boren, Tom	*How Industry and Later APMP Made Contributions to Proposal Process*
History	Boren, Tom	*Win Rate Mischief [Trends & Views]*
History	Boren, Tom	*The Impact of Evolving Government Procurement Practices*
History	Boren, Tom	*The Impact of Technology (on Proposal Development)*
History	Sokolow, Jayme	*Renaissance Proposal Managers – da Vinci and Machiavelli*
History	Sokolow, Jayme & Green, R. Dennis	*Wright Brothers' 1908 Proposal for a Heavier-Than-Air Flying Machine*
Products-Commerce	Green, R. Dennis	*Proposal Products: Review of Proposal Automation Tools*
Review-Book	Brome, Nancy J.	*Handbook for Writing Proposals (by Robert J. Hamper and L. Sue Baugh)*
Review-Book	Mitchell, Linda	*Show Me: The Complete Guide to Storyboarding and Problem Solving (by Harry I. Forsha)*
Review-Book	Perri, Rich	*The Anatomy of Persuasion (by Norbert Aubuchon)*
Review-Book	Prichard, Beth M.	*High-Impact Presentations: A Multimedia Approach (by Jo Robbins)*
Trends & Views	Dean, Roger	*From Cave Walls to the Internet: Lots of progress, but are we any better off?*

EDITORIAL STATEMENT AND GUIDELINES FOR AUTHORS

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

Editorial Statement

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

Content

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

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

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

Submissions

The following are requirements for articles/manuscripts submitted:

- Not more than 30 pages (15 pages single-spaced) including exhibits, printed on 8 1/2" by 11" paper.
- 12-point font and at least one-inch margins on all four sides.
- Double-spaced throughout, including references.
- Submit an electronic file of your article via e-mail or on a 3 1/2" disk (high density format). Microsoft Word is the preferred electronic format; Corel WordPerfect, Rich Text Format (RTF) or ASCII file format are also acceptable. Alternatively, you may submit four hard copies of your article via regular mail.
- In addition to the text file, submit one electronic file for each 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 *Proposal Management*'s Managing Editor or the Chair of the Editorial Advisory Board. (General inquiries can be made to the APMP Executive Director at (949) 493-9398.

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

Manuscript Preparation

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

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

Style

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

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

Review

Submissions, if they conform to the above specifications, will be reviewed by the Journal's Editorial Advisory Board in accordance with the Board's internal procedures for review. In general, 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 with constructive suggestions on how the article might be improved to increase its accuracy, quality, or impact.

Conflict of Interest

While journal staff and contributors to *Proposal Management* may benefit from the professional recognition they gain through this affiliation, they shall not use the journal as a forum to give inappropriate or unfair advantage to themselves or others. Journal staff members and contributors are permitted to purchase advertising in P*roposal Management* 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, journal staff or contributors may be asked not to involve themselves on the subject of the conflict of interest.

Objectivity

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

Reprints & Web Posting

Permission to make digital or hard copy reproductions of published material for personal, classroom, or other not-for-profit purpose is granted without fee provided that: (a) requesting individual or entity first requests and receives written permission from an authorized APMP representative in advance; (b) copies or postings not be made or distributed for profit or direct commercial advantage; (c) the publisher (APMP), title of publication, and publication date appear on the reprint or posting; (d) excerpts, if used, may not distort the integrity of the original article or column from which they are taken; (e) any Web site displaying the article include an electronic link to the APMP Web page, http://www.apmp.org; and (f) all reprints or postings must be appended with an approved "APMP Identification Statement" advising readers that the article or excerpt is reprinted or posted with permission and that material is protected by copyright.

To republish, copy, post on servers, or redistribute to lists outside of these guidelines may be permitted if prior specific permission is granted and/or a per copy or negotiated fee is paid to the APMP. Address such requests or requests for additional information to the Executive Director, APMP, P.O. Box 668, Dana Point, CA 92629. Reprints are also available through the publisher at modest cost; please contact our office at (949) 493-9398.

Copyright

The Association of Proposal Management Professionals holds the copyright to all material published in *Proposal Management*. When previously copyrighted materials are republished or excerpted in the journal, they are so marked with proper attribution. Republication, reprint and Web posting rights may be granted, in accordance with above statement and policy. If your manuscript has been previously published or presented, or if you are submitting it concurrently to other publications, you must inform APMP when you submit the manuscript.