Welcome

Ali Paskun, AF.APMP

The first APMP Annual Conference I attended was in 2000 at the Walt Disney World Dolphin Resort in Orlando, FL. During that conference, David Winton announced that volunteers were needed to review articles for the Journal. I volunteered and began a journey of involvement on the staff that led to my current position as Managing Editor. It has been a lot of work, but even more fun. I have been able to contribute to the Association, and I have also had the opportunity to meet other APMP members.

So, it is with a sense of nostalgia that I look forward to the 21st Annual APMP International Conference & Exhibits being held once again at the Walt Disney World Dolphin Resort in Orlando, FL on June 1 - June 4, 2010. Co-chairs Betsy Blakney, PPF.APMP and David Winton, F.APMP chose the theme of "Going Green: A Global Initiative - All Things Considered." Information about the conference is found on pages 8 and 9 of this issue, and I hope you will consider attending. Not only will you enjoy three days of excellent presentations and workshops, you will also enjoy being with other professionals in our industry. Who knows; you may even decide to volunteer to review an article or serve on the staff of the Journal!

If, however, you would prefer to see your name in print as an author, Jayme Sokolow clearly describes the article submission process in his piece, "So You Want to Write an Article? A Brief and Encouraging Guide to Writing Articles for Proposal Management."

In the Fall/Winter 2009 issue of the Journal, we told you about our new initiative to print each issue on recycled paper, but the greening does not stop there. In this issue, Colleen Jolly offers some easily implementable changes in proposal design that "can save a few trees, some cash, and the world." No doubt you will find an eco-tip or two that you can put into practice to make a difference. A famous frog once sang,"It's not easy being green." Perhaps Kermit would have sung another tune if he had read this article and discovered how to employ these simple tips!

Also in this issue, Michele Rochon offers advice on creating an effective win theme, specifically in a technical sales environment. On the more personal side, R. Dennis Green profiles Jon Williams, someone well known to APMP members, especially those who have attended one of his many presentations with his cohort, BJ Lownie.

So, get a glass of lemonade, make yourself comfortable under a tree, and browse through the nuggets of information and fun in this issue.

See you in Florida!

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CEO **Forum**

Kirste Webb, AF.APMP

What do all those letters mean?

As proposal professionals, we know the importance of selling a person's credentials in a resume. The letters "PMP" and "PE" often carry a lot of weight in an evaluation for Project Management Professionals and Professional Engineers. These letters mean that these individuals have achieved certification and accreditation for their work and for their profession. But what about proposal professionals? Is it really important to strive for that same type of accreditation?

ABSOLUTELY! As one Human Resources Representative stated, "I think accreditation and recertification solidifies the professional has current education in their area of expertise and most importantly is focused on keeping current." This is critical for proposal professionals. Our world is continually changing, and the demands on our expertise and capabilities continue to increase. Accreditation is what sets an individual apart from others, especially in a difficult and competitive job market. Recruiters are also looking for this same level of accreditation. More and more companies have identified APMP accreditation as a preferred qualification. As noted by one recruiter: "In an increasingly difficult jobs market, APMP has become very important to employers… Since proposals are the lifeblood of most organizations, employers tell me that knowing that the person has the skills learned while attaining an APMP accreditation definitely increase the chances of a successful and winning proposal."

APMP offers three levels of accreditation for our members:

Foundation—for individuals with at least one year of practical experience. It tests an individual's basic knowledge of proposal best practices through the form of a multiple-choice exam.

Practitioner—for individuals with at least three years' practical experience. It tests for an individual's application of best practices. This is accomplished through an online self-assessment questionnaire.

Professional—for individuals with at least seven years' practical experience. It tests an individual's advocacy of best practice through a formal presentation and interview process.

To date, nearly half of APMP's membership has some form of accreditation. The largest percentage, nearly 1,400 members, has achieved Foundation Level. Approximately 10 percent of those individuals have achieved Practitioner Level, and of those, approximately 2 percent have achieved Professional Level.

These numbers demonstrate the success of the program, but they also indicate that perhaps many are stopping at Foundation Level. There are many reasons why individuals may choose not to pursue a higher level of accreditation—cost or time to respond to the questionnaire. I can

"Accreditation and recertification solidifies the professional has current education in their area of expertise and most importantly is focused on keeping current."

“Since proposals are the lifeblood of most organizations, employers tell me that knowing that the person has the skills learned while attaining an APMP accreditation definitely increase the changes of a successful and winning proposal.”

personally attest to the time part, as I am currently working on my self-assessment questionnaire for Practitioner. While I manage proposals for a living that require me to focus my words to stay within page count, the Practitioner self-assessment requires even more focus to provide clear descriptions of my achievements, while staying within the required word count. This is not easy to do when trying to document my work history and prove that I have performed within each of the key competency areas. But I also know I am not alone. APMP provides mentors to support me and to support you in achieving these higher levels of accreditation.

I also know that once I obtain this next level of accreditation, that I have achieved a significant goal to demonstrate my knowledge, understanding, and application of proposal best practices. This not only benefits me, but it also benefits any organization with which I work, including:

- Encouraging staff retention
- Supporting competency-based recruitment and promotion of staff
- Supporting organizational initiatives such as Investors in People (IIP)
- Identifying performers
- Improving overall performance.

So join me this year in achieving APMP Accreditation—Foundation, Practitioner, or Professional. For more information, check out our Website (http://www.apmp.org/ca-16.aspx) or contact Chuck Keller, APMP Accreditation Program Director (chuck.keller@apmp.org).

P.S. My goal is to complete my Practitioner self-assessment questionnaire by the APMP annual conference in June. If you want to join me in this goal, please contact me at kirste.webb@apmp.org.

APMP Mission and Code of Ethics

Mission

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

Code of Ethics

Members of the APMP are expected to:

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

At the Walt Disney World Dolphin
Orlando, Florida
June 1 through 4, 2010
Conference Co-Chairs: Betsy Blakney, PPF.APMP and David Winton, F.APMP

Just as the success of our chapters is vital to the sustainability of APMP®, what we do as individuals and citizens of these countries is crucial to the survivability of our nations. Join us in 2010 as we embark on a green revolution and consider those actions that make a difference in our daily lives as business and proposal development professionals.

Going Green: A Global Initiative – All Things Considered

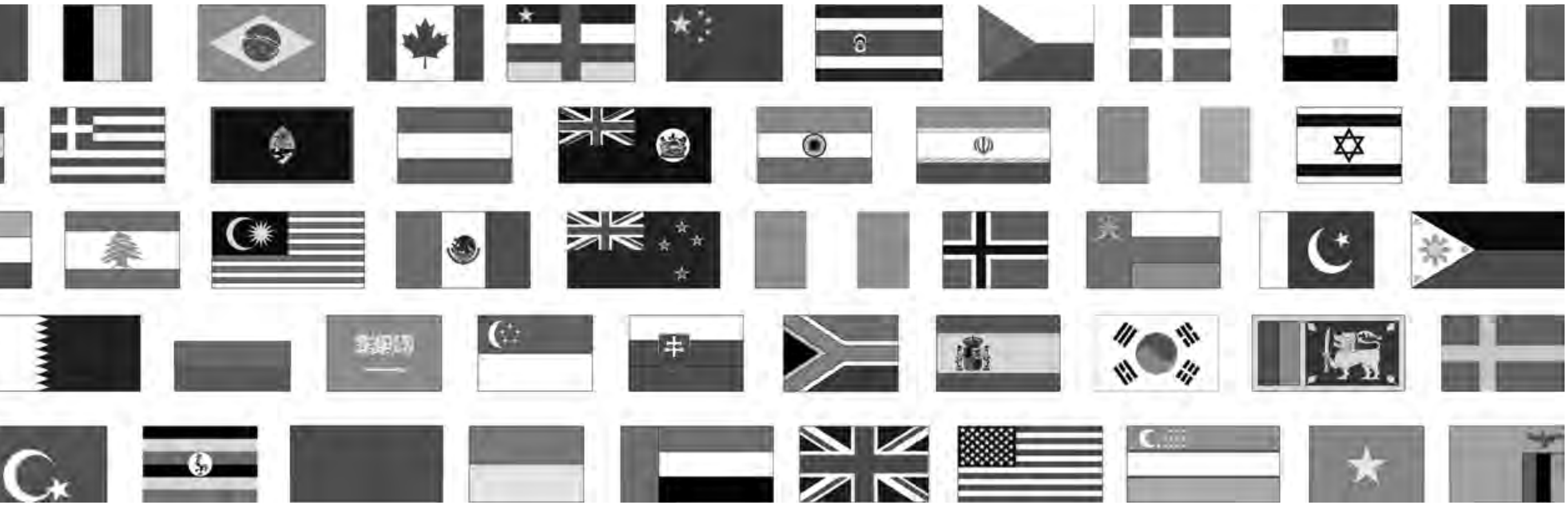
The focus of the 21st Annual APMP® International Conference & Exhibits is Going Green: A Global Initiative - All Things Considered. As our membership continues to grow internationally, we have a greater opportunity to collaborate and share the knowledge that breeds excellence. In our profession, finding ways to solve our clients' problems in a more effective and efficient manner usually translates to cost-savings and improved performance. This year, we are challenging you to re-examine your practices —good or otherwise—and think about how you can Reduce, Reuse, Recycle, Renew and Reform them.

Keynote Speaker

While our conference program focuses on reducing our carbon footprint, our keynote speaker sees an expanding footprint in the Web ecosystem. This year, we welcome Martin Brossman of Martin Brossman & Associates. Known for his focused rapid-results coaching, Mr. Brossman is an executive and business success coach, speaker and trainer. He recently received the Fortner Award honoring the St. Andrews Presbyterian College alumnus as an author who has created authentic positive community. His book *Social Media for Business* incorporates social media training to accelerate growth for entrepreneurs and small businesses. He has originated in-person and online networking groups that have facilitated valuable business connections among members. You can find him on the Web on LinkedIn®, Twitter™, and Facebook©.

Mr. Brossman's IBM background and computer skills have powered his ability to create and teach crucial new Internet communications, such as blogging, podcasting, and online networking. His own podcast show can be heard at www.Inquire-eOnLine.info. He offers consulting on how to generate profitable alliances by maximizing face-to-face and online presence and managing "the conversation of you" on the Web.

His 20 years' experience includes 7 years with IBM, where he received the "IBM Means Service" top customer service award, and 13 years developing and operating small businesses. Coaching since 1995, he developed a certification/mentoring program for Coaches in 2003. A native of Washington, DC, he holds a B.A. in Math/Computer Science from St. Andrews College in Laurinburg, NC and currently resides in North Raleigh.



21st Annual
APMP® International Conference & Exhibits

Why Attend

This conference brings together recognizable thought leaders, up and coming professionals, and members willing to stand up and demonstrate their corporate social responsibility.

From sharing insights into the proposal profession, to listening to case studies on what works and what doesn't work in a proposal environment, you will become more aware of the opportunities to streamline your operations, drive quality, and set or incorporate standards for improved performance.

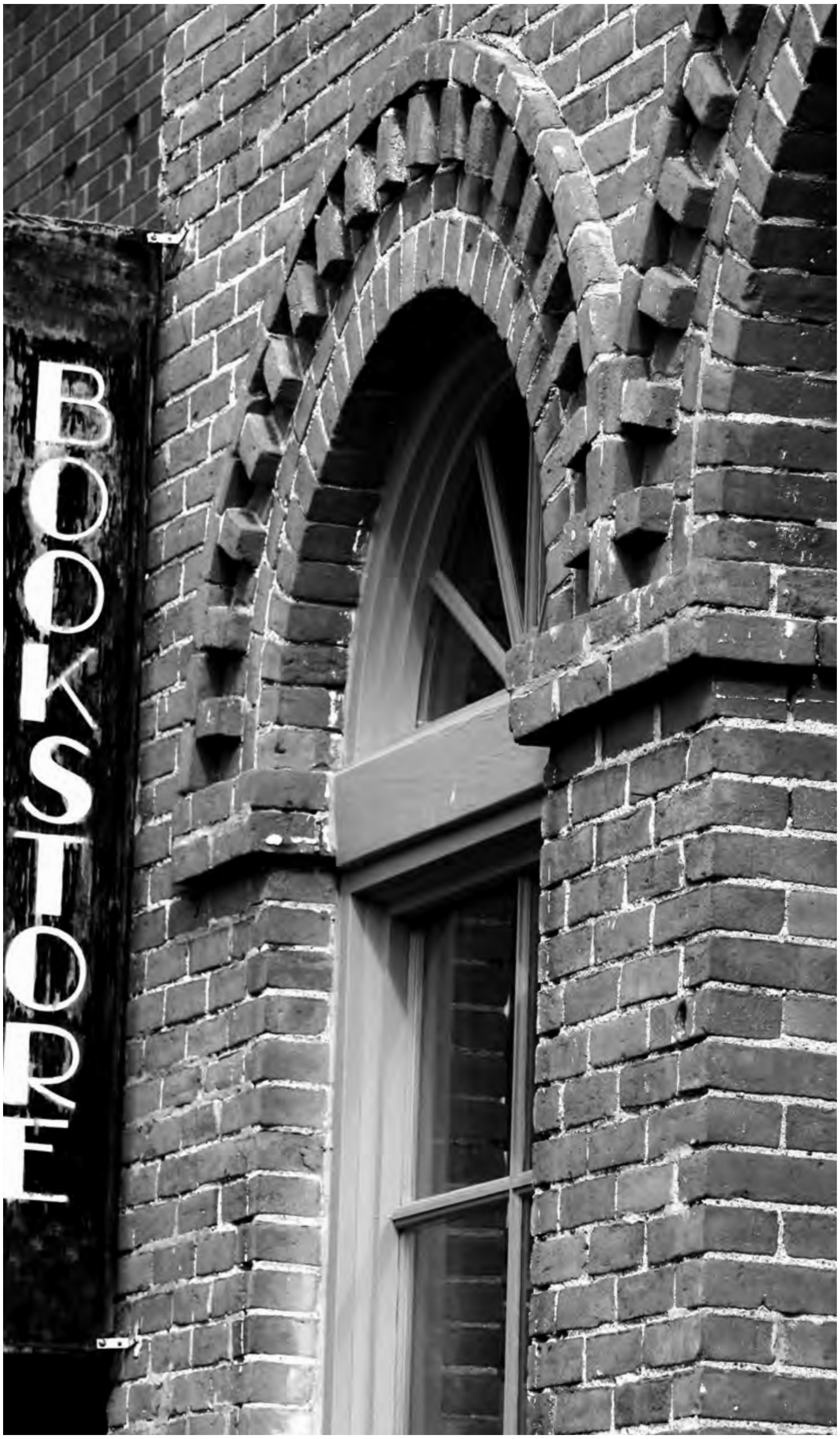
From the initial networking session to the closing session, you will come away with refined skills, reliable approaches, and a refreshed attitude toward the impact you are making in the profession.

We are proud to serve as co-chairs and invite you to attend the 21st Annual APMP International Conference & Exhibits.

Some of the Topics Include:

- What is the Cost of Going Green?
- Tips and Tricks for Successful Virtual Teams
- A Peek at the Other Side of the Procurement Table
- The Lost Art of Feedback
- Proposal Production
- Meetings that Save, Time, Money, Energy and Sanity
- Reuse of Good Capture Information
- Renewing Your Committment through Accreditation
- Federal Legislative and Regulatory Information
- Compliant Pricing Strategies
- Renewing Your Team
- Proposal Risk
- Web-enabled Presentation Tools
- Executive Summaries
- Software Tools, Tips and Tricks.

Searching for a book?



We got it.

Book Store

June 1 – 4, 2010 at the

21st Annual
APMP® International
Conference & Exhibits

Come explore a variety of proposal, graphical, and management literature to create or improve upon existing processes.

Managing Editor
Ali Paskun, AF.APMP
CSC
3160 Fairview Park Drive
Falls Church, VA 22042
apaskun@comcast.net
p: (410) 456-5623

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
p: (301) 933-3989

Senior Editor
Linda Mitchell
Qwest Government Services, Inc.
4250 N. Fairfax Drive
Arlington, VA 22203
linda.mitchell2@qwest.com
p: (703) 363-4366

Assistant Editor
Betsy Blakney, PPF.APMP
CACI, Inc. – Federal
1100 North Glebe Road, 01/03
Arlington, VA 22201
bblakney@caci.com
p: (703) 841-7868

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

Books Editor
Jim Hiles
MorganFranklin Corporation
1753 Pinnacle Drive,
McLean, VA 22102
jim.hiles@morganfranklin.com
p: (301) 247-5361

Book Composition and
Cover Design
Colleen Jolly, APM.APMP
24 Hour Company
6521 Arlington Blvd.
Suite 501
Falls Church, VA 22042
colleen@24hrco.com
p: (703) 533-7209

Advertising, Subscriptions,
and Information
David Winton, F.APMP
APMP Executive Director
P.O. Box 668
Dana Point, CA 92629
apmpinfo@apmp.org
p: (949) 493-9398
f: (949) 240-4844

Editorial Advisory Board:
Martha Bergweiler
Tom Boren
Michele Bradley
Deborah Brooks
Joan Ford
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Dennis Green
Diana Love
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Nikki Parker
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Chris Simmons
David Sotolongo
Marty Williams

For more information about how you can join *The Journal* staff, contact:
Managing Editor, **Ali Paskun, AF.APMP**
Assistant Managing Editor, **Jayme Sokolow**

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APMP®

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

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

Membership

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

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

APMP's Federal Tax ID Number is 87-0469987.

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Members of APMP can update their profile online by clicking "Membership" on the APMP Web page, and then clicking "Update Member Profile." Updating a profile requires the username and password you were provided when you became a member.

Any change in correspondence relating to non-member subscriptions should be sent to:

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

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

Advertising Rates and Guidelines

The following rates are effective through June 30, 2010:
Rates per Issue
Premium Placement Locations*
(Sold for both 2010 issues)

- Back Cover: $3,000.00 (4 Color)
- Inside Front Cover: $2,500.00 (4 Color)
- Inside Back Cover: $2,500.00 (4 Color)

All Other Placement Locations*

- Full Page: $2,200.00 (4 Color)
- Full Page: $2,000.00 (B&W)
- Half Page: $1,200.00 (B&W)

*15% discount for all contracts of three or more consecutive issues with payment in advance. (Rates for 2011 will be published in the Fall/Winter 2010 issue.)

Schedule:

- Ad commitment (50% deposit required)—due February 1st (for Spring) or August 1st (for Fall)
- Electronic copy—due March 1st (for Spring) or September 1st (for Fall)
- Final payment due to APMP—March 1st (for Spring) or September 1st (for Fall).

To Secure Advertising Space:

Please contact David Winton at (949) 493-9398 or email apmpinfo@apmp.org

Advertising Format and Guidelines:

Submit all artwork electronically as CMYK or Grayscale 300 dpi TIFF or PDF, with 1/8th inch bleeds (if applicable) and crop marks to colleen@24hrco.com.

For technical assistance, please contact Colleen Jolly at 24 Hour Company, (703) 533-7209, colleen@24hrco.com.

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

Invitation to Writers

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

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

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

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

Managing Editor
Ali Paskun, AF.APMP
(410) 456-5623
apaskun@comcast.net

Assistant Managing Editor
Jayme Sokolow
(301) 933-3989
jsoko12481@aol.com

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If your product or service advances the art, science, and technology of business development or proposal management, our readers want to hear about it.

If what you are selling promotes professionalism in a dynamic profession, our readers are interested.

If your organization is looking for talent, you will find it among our talented readers.

If you seek the means to help people shape their future, consider this journal—a proven venue that offers both "best value" and best price.

Call David Winton
(949) 493-9398

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

Guidelines for Authors

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

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

Editorial Statement

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

Content

The Journal publishes the following types of peer-reviewed articles:

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

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

Submissions

The following are requirements for articles/manuscripts submitted:

- Not more than 30 pages, including exhibits, printed on 8 1/2" by 11" paper
- 12-point font and at least one-inch margins on all four sides
- Double-spaced throughout, including references
- Submit an electronic file of your article via email; Microsoft® Word is the preferred electronic format
- In addition to the text file, submit one electronic file for each exhibit in TIFF or JPG format; screenshots are preferred to be captured and output should be 6" (width) by 4.5" (height) for full screens
- Submit your article to the Managing Editor or the Chair of the Editorial Advisory Board:

Manuscript Preparation

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

- Provide the manuscript's title and name(s) of author(s) at the beginning of the paper
- Provide an informative abstract labeled "Summary" of approximately 150 words

- Use up to fourth-level headings
- Place all exhibits in the text with a descriptive caption
- Bibliographic references should be indicated in the text by the last name and year of publication in parentheses [i.e., (Jones, 1978)]
- At the end of the text, provide a complete list of works cited (labeled "References") using full names of the authors and their book
- All citations in "References" should conform to standard academic practices; conformance with *The Chicago Manual of Style* is preferred
- At the end of the text file, include a biographical sketch labeled "Author(s)" of no more than 100 words for each author; describe author's professional experience, education, institutional affiliation, professional organizations, and an email address and a telephone number where you can be reached during business hours.

Style

Articles must be well organized and readable. Write clearly and avoid jargon and acronyms. Use the active voice. Avoid language that might be construed as sexist, and write with *The Journal's* international audience in mind. The authority for spelling/usage is *Webster's Dictionary*, and *The Chicago Manual of Style* is the authority for punctuation and format. All articles are reviewed and edited by members of *The Journal* staff.

Review

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

Acceptance

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

Conflict of Interest

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

Objectivity

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

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Green is the

Almost all of our customers require some form of printed materials to be delivered—whether in the capture phase, the proposal phase, or as a deliverable. Typically during the process of developing these materials we waste reams and reams of paper, dozens of ink cartridges, binders, paper clips, time, energy, and other office materials while perfecting that solution, testing its look, and sharing with our reviewers or office mates. We often have no idea how many tons of materials are being casually wasted in the pursuit of business. What if we could provide the same level of quality but in a more mindful way, using greener materials that have less environmental impact, or even rethink the way we are presenting information to sell more effectively? What if you could save money or time in the process? What if you could save the world, too?

New Black

How "Greening" Your Proposal Design Can Save a Few Trees, Some Cash, and the World

By Colleen Jolly, APM.APMP

Setting The Stage

I have this very distinct memory of being in kindergarten in New York and watching a film on how to brush your teeth. The message of the film was not really "how" to brush your teeth, as it was to turn off the water while brushing your teeth—to be mindful of your water usage. It is the first time I recall learning to be "mindful" about waste. By third grade, recycling bins started to become common in suburban neighborhoods and almost every milk jug and aluminum can found its way out of the trash. In fourth grade, I performed in our school play about garbage, as a butterfly that flitted above the trash pile. The first line of the opening song is forever embedded in my brain: "Garbage, garbage, garbage, garbage, there's garbage everywhere! There's garbage in the streets and garbage in the air! Garbage, garbage, garbage, garbage, now what can we do?" My generation has been exposed, from a very young age, to the concept of being mindful about the world around us. But until the past few years of the rapidly expanding "Green Revolution," I feel like we have all stopped at aluminum can recycling and turning off the water while we brush our teeth.

Dreams are like paper, they tear so easily.

–Gilda Radner

Part of me is happy that at least I am trying to do something "green"—making small steps that do add up over months and years. Yet the rest of me reads articles about composting and rain water collectors in the American West and deforestation and rampant pollution in Asia, and I wonder if I can do more. I believe that many people may be thinking similarly, "if only I knew what could be done or if only I was presented with greener alternatives that were easy to find and implement, then I would change my habits and preferences."

Luckily for the busy professional, there is a myriad Internet resources, books, and experts who have blazed a trail forward. The challenge is picking the solutions that are best for you and easiest to integrate into your already busy life.

In this article I want to introduce you to some of the most current "green" theory. To learn what is actually possible in the real or business world outside of pure theory, I also interviewed some graphic designers and print professionals who have started providing green solutions for their clients. Throughout, and perhaps most directly useful for you, busy professional, are the "eco-tips" —direct recommendations for where to go, what to buy, and how much money and time that green solution will cost or save you in your efforts to go green.

Why go green? Is it only a buzzword that is popular now, destined to disappear after a few years of interest? The green or more accurately the sustainability movement—not using resources faster than they can be replenished—has been gaining momentum and visibility in the past few years, but it has existed for as long as there have been human beings on this planet. Industrialization and increasing population size have quickened the concern over how fast we, as a global community, are depleting resources such as oil, lumber, clean water, and others previously believed to be inexhaustible. If we do not modify our behaviors to use less consumables, produce less waste, or create innovative solutions for monitoring our consumption, then the things we take for granted now will be scarce or unavailable for our children and their children. I want to share trees, clean water, and clean air with my kids and with yours.

I Challenge You:

take one eco-tip within a month of reading this article to modify your habits and the materials you use every day in your professional lives.

Green Theory

In his book *Green Graphic Design*, Brian Dougherty introduces the idea that design as defined as an overall concept, not simply the color and style of a visual element, can participate in the green movement in three major ways. He likens these ways to the layers of an avocado. (Dougherty is based in California; one may use many food analogies, my favorite in this instance is to substitute "éclair" for all avocado references to achieve a similar layering). The outer or "obvious part of design that we immediately see—the layer of stuff" (Dougherty, page 8) is the printing, the colors, the style, and other "finished" trappings of design. There are many, many easy and simple things that can be done to improve the greenness of this layer in your materials. The second layer is the "meat"—delivering the messaging of the inner layer, such as weighing the options of creating a video versus a 12-page brochure.

The final and core layer is the "central challenge around which all of the messages and stuff of design revolve: effecting change" (Dougherty, page 9). The "seed" of the avocado is when the designer influences their client or the end customer to make a positive and large change to benefit themselves and the world around them, and not just win new business. Lately, many companies are using green messaging to recast and draw favorable attention to existing products or services they offer to gain more customers or more mind share in the marketplace, such as actively advertising that you use recyclable materials or have purchased carbon offsets for all corporate travel.

As business development and sales professionals, we are not merely selling a technology product or a consulting service. We are selling security, lowered risk, and an assurance that our clients will be better off after working with our company. We have the ability to craft our proposals to better suit the clients' needs, and are in a unique position to recommend options that will improve their situation beyond the requested specifications. If your solution exceeded the required 50 percent increase in efficiency by providing a 100 percent increase in efficiency, you would tell your client, right? While some Requests for Proposals are very strict and this method of up-selling or providing options in excess of, or tangential to, the original request may be detrimental in the scoring process, other,

So often is the virgin sheet of paper more real than what one has to say, and so often one regrets having marred it.

—Harold Acton

eco-tips

**Listen to your customers.
Read their Websites.
Are they "going green"?**

If they are, deliver your proposals on eco-friendly paper (see recommendations in the "Love of Paper" section) and tell them that you are doing it: "We believe in your mission and, to help you go green, we have printed this proposal on 100% recycled paper."

particularly commercial or unsolicited proposals, will benefit by distinguishing your company from the competition.

Recast your solutions to be world changing. If you focus on the seed of the avocado or the delicious cream filling of the éclair and find out what you truly offer, you can change the way your customer understands and buys. Andy Bounds, a UK communications guru, has an exercise in his books and lectures that helps people find their "seed." You must repeatedly ask yourself what your company provides until you discover what resonates with your customer. Do you offer network support for computer systems? No, not interested. Do you offer 24x7x365 worldwide support? I may be interested.

Do you offer complete piece of mind so that your customers' networks never go down, allowing for continuous operations that never interrupt their lives? Now, I'm interested. Add that your solution is more energy efficient, produces lower emissions, and works with the indigenous population, and you are starting to change your world positively while still supporting your customer.

This mindset is the hardest and the slowest to change. We may not be able to affect our companies' decisions to move towards more eco-friendly practices that would be relevant in the messaging/world changing stage of our proposals. The most important thing is to learn to think creatively and broadly—build a global lens into your business practices and start to understand how your small decisions have large impacts. Focus on what your end-goal is, and it will be easier to modify your delivery and design elements—the meat and the skin of that avocado, respectively—to work towards larger and positive global changes.

"Your range of possibilities as a green designer is directly related to how you define your role as a designer. If you think of yourself as a manipulator of stuff, then you can specify recycled paper and green printing. If you think of yourself as a message maker, then you can actively help influence the ideas and brands you work with. If you think of yourself as an agent of change, then you just might be able to change the actions of your audience, your clients, and your peers." (Dougherty, page 13)

A "2009 Government Printing Report," researched and published by Lexmark and O'Keeffe & Company researched the way that federal employees used paper. More than 92 percent of employees surveyed across agencies, generations, and pay grades said they printed more than they needed on a daily basis from their government offices (most admitted to printing much less when working from their home offices). Many agencies do not have printing policies that specify duplex printing or have employee-coded printing, much less recycled paper or other greener options. This creates a renegade print culture that spends almost $500M per year. The Lexington Report found that most employees would welcome digital or electronic file policies, and more than 78 percent said that transitioning from paper-based solutions would make their jobs easier. The report recommends a series of easy changes that would result in a $440M savings per year.

Find these types of statistics, use them to modify your behaviors, and recommend quick and easy fixes for your clients.

Sustainability and the Value (Daisy) Chain

You have worked with your team and committed to your true world-changing, client-resonating message—now how to package or deliver it.

Have you had this experience—a colleague rushes into your office and says: "I need a brochure, I need a slick sheet, I need a video, I need some other very specific type of marketing, and I need it yesterday." We are in such a rush to accommodate the need that we do not stop to think about why these requests are so specific. Is it because your colleague has explored the most efficient way to deliver your message? Typically not. It is because we get too wrapped up in the details of physical design to find the best method of delivery for our ultimate message. Similarly,

not every proposal needs a puzzle graphic or a wedding cake graphic or any other named graphic. What every proposal needs are visuals that communicate your solution clearly.

You must spend time thinking on two fronts in this level. The first is finding the best way to actually deliver your message. You must consider how your client understands and is receiving the information to find the optimal delivery method. For a very important meeting with a potential investor, a client of mine decided to create a 10-20 slide presentation on his company's capabilities. He had started designing his slides and was working on perfecting his script when the investor contacted him and specified that he only wanted an in-person demonstration of the product in less than 15 minutes. My client listened to his potential investor, abandoned the slide deck, and eventually won the investor's support. Had he not listened to the investor's desired delivery method, or had that investor not specified that method, my client might have lost important new funding.

The second front in this level is to consider how the world is affected by your creation and delivery of your message. In the example above, my client was in the UK, and he has arguably saved trees, money, and emissions by not creating a slide deck that would have been printed, shipped, and presented during a formal meeting. His potential investor requested a short demonstration in Kuala Lumpur, Malaysia—a long flight from the UK. My client could have weighed the alternatives of sending a local, or physically closer, representative (if one was available for the meeting) or buying carbon offsets for his flight.

A carbon offset, or allowance, is a financial tool that allows both individuals and businesses to pay for their use of carbon dioxide or greenhouse gas emissions, such as during a trans-Atlantic flight. British Airways offers an option during their online booking to add the carbon offset of your exact flight to the total purchase cost. Various organizations such as the European Emissions Trading Scheme run programs to fund projects that create sustainable energy such as wind farms. Ultimately, my client's decision to have a short, less formal presentation had the possibility of being more "green" than the standard, customary delivery methods, while also being the most effective way to communicate the message to the potential investor.

When you sell a man a book, you don't sell him 12 ounces of paper and ink and glue—you sell him a whole new life.
–Christopher Morley

Think of it as a constantly focusing lens—you must zoom in to see what your client wants and what is the best way for them to understand your message. Is it a 1,000-page document or a 2-minute video? Then zoom out and think about the physical resources such as paper and the labor/monetary costs of hiring consultants or paying overtime to generate a 1,000-page document versus a 2-minute video. How does that choice affect the world, positively or negatively?

Sustainability is a word that is bandied around frequently. At its most basic the concept refers to a system's needs that do not exceed the resources of that system. Working 24 hours a day, 7 days a week as one regular person (and not a super hero proposal professional) is not sustainable and the system those actions are in is ultimately not sustainable. The ideal is to work within the resources available to create the desired, same, or even improved outcome. Think sustainably, and use options that are renewable or are less wasteful.

For example, do not use overnight delivery services if you can drive your proposal to your customer. This generates less emissions and costs less. Send files electronically to a printer or other resource located near the delivery point rather than printing at your plant and then shipping. Run a cost-benefit analysis on all of your marketing, particularly anything that is printed. Do you throw out boxes of unused brochures every few years? Maybe it is time to cut back the quantity or try a new delivery method.

Sustainability is a big concept, and the first step is to audit what your company is doing. Until you know how you do business and what your expectations are, you cannot change your paradigm.

The side bar offers some eco-tips across the lifecycle of your proposal production, from printing for reviews to shipping materials.

For the Love of Paper

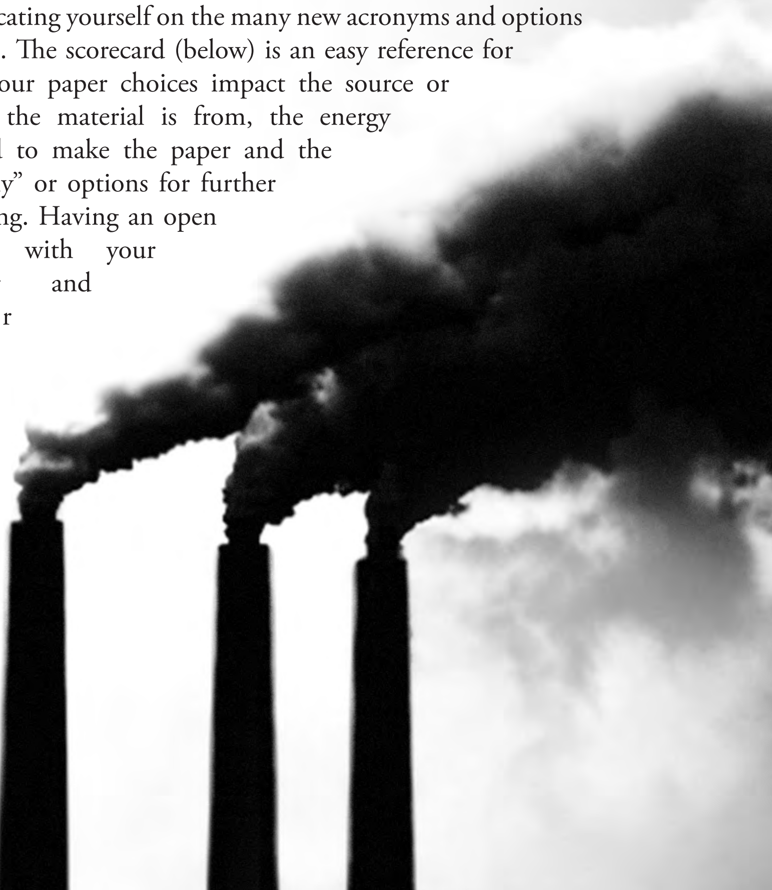
The last layer and the one that is easiest to positively and "greenly" modify in your day-to-day activities is the actual skin of the avocado. You have your message, you have the best way to deliver it; now you must dress your solution. There are as many options and as many new acronyms to fill libraries on the subject. The most common is paper.

We deforest acres of trees annually. Trees are renewable since they will grow when replanted, but they do not grow as quickly as we require them for paper, building supplies, and fuel; and they are not the most efficient material for making paper. Three tons of wood makes one ton of paper. Other materials such as bamboo, hemp, and linen used in non-Western societies predating the industrialization of the paper industry are more efficient and may be cheaper and more durable long term. We contribute directly to deforestation through paper use. Paper mills produce an average of 9 percent of all greenhouse gases worldwide and are the number one industrial user of water worldwide. Due to their extreme water usage, most paper mills are located on rivers, and the chemicals used to bleach or color paper can leech into water supplies to disrupt local ecosystems that eventually, if not immediately, impact human neighbors as well (Dougherty, pages 122-130).

Post-consumer recycled fiber (PCR) paper requires less water and less energy to create new paper than virgin or direct-from-wood materials do. Non-bleached paper, using Elemental Chlorine-free (ECF) bleaching or Total Chlorine-free (TCF) bleaching that is slightly less white, or choosing a paper that is not "bright white," potentially keeps less chemicals from entering the water supply. The Forest Stewardship Council (FSC) is a non-profit organization devoted to encouraging the responsible management of the world's forests. Paper sources can apply to be FSC-certified, which requires a rigorous commitment to conversion and sustainable practices.

Many inks that are printed on paper of any kind can also be toxic or contain heavy metals that in large quantities affect an ecosystem. Soy-based and vegetable-based inks are safer than many traditional methods. Print cartridges can be wasted regularly—follow your manufacturer's instructions to return used cartridges for recycling—toxins can leak into landfills if you put those materials in your regular trash.

Educating yourself on the many new acronyms and options is hard. The scorecard (below) is an easy reference for how your paper choices impact the source or where the material is from, the energy needed to make the paper and the "destiny" or options for further recycling. Having an open dialog with your printer and other



Everything in Life is Negotiable:

Do not take what you or your company does for granted. Think through some quick solutions to improve your bottom line and the environment.

Shipping Stuff:

- Try using U.S. Postal Service priority 2-day mail for things that do not need to be received overnight (or update your schedule to accommodate). You will save money and emissions.
- Try not shipping at all and developing a local network of printers near your large existing or target customers who can deliver via car or truck.
- Really plan ahead and ship things by ship, the most green method of transport (if possible).
- Use lighter weight materials that will ship more cheaply and use less fossil fuels to transport.

Packing Stuff:

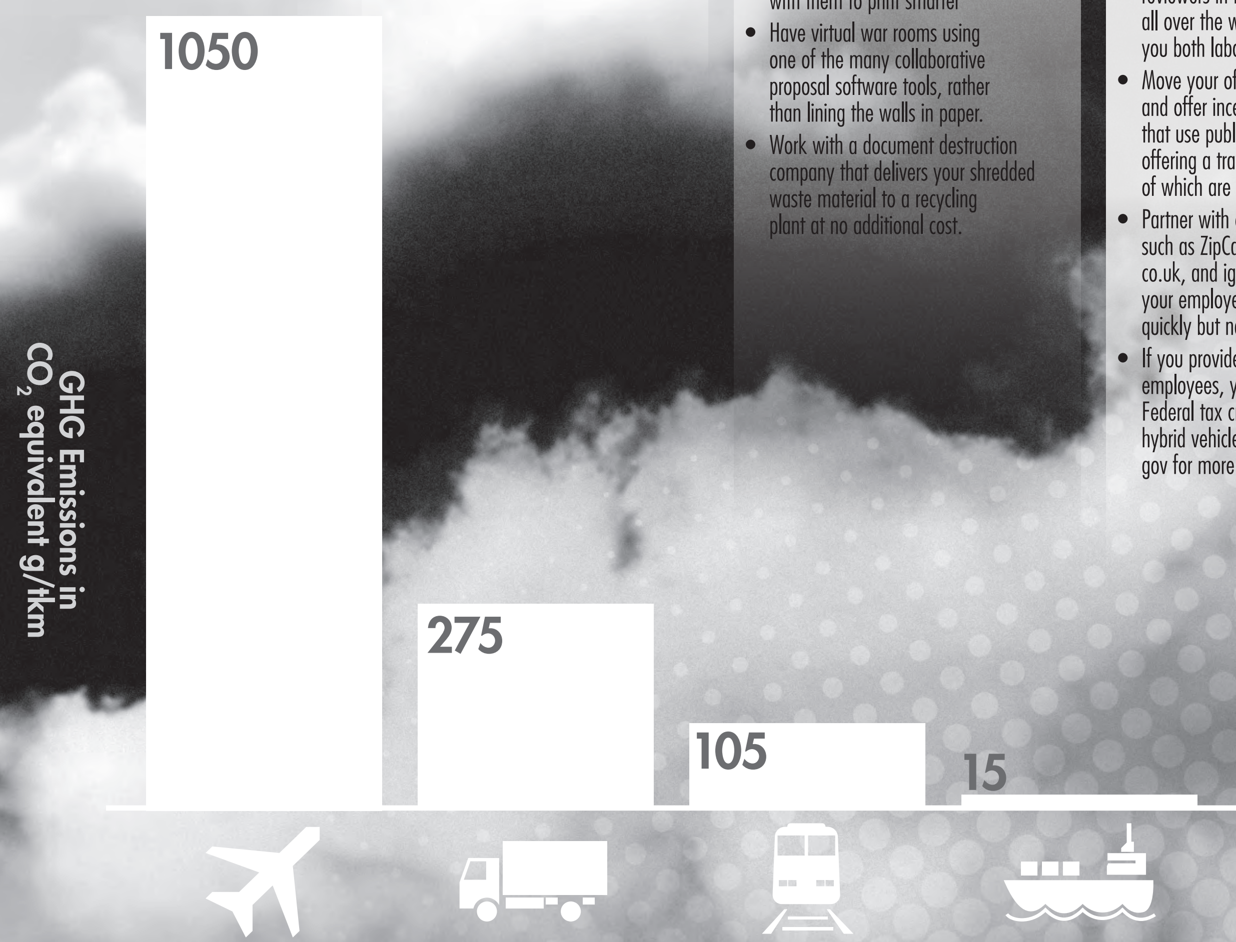
- Be considerate in how you package items. Always buy/use bio-degradable packing peanuts.
- Think through how your binders or deliverables will fit in a box before you create the binders or find the box. Minimize the need for extra packaging materials that will often get thrown away at their destination.
- Consider non-standard packaging that integrates your message, such as reusable containers your client will keep.
- Reuse packaging (many overnight services now offer multi-use envelopes) or recycle cardboard containers rather than throwing them away.

Paper:

- Always go with options that are comprised of virgin-wood.
- Think about non-printing, non-paper-based solution. Downloadable or print-on-demand saves paper and drives customers to your Website. This is cheaper, produces less waste, and has an additional marketing component.
- Focus on being electronic. Acrobat makes great tools to electronically edit or comment on documents that do not require printing 20 copies for meetings.
- Set all printers to automatically print double-sided and immediately cut your paper expense in half.
- Set all printers to have individual employee codes to identify who is printing excessively, and work with them to print smarter
- Have virtual war rooms using one of the many collaborative proposal software tools, rather than lining the walls in paper.
- Work with a document destruction company that delivers your shredded waste material to a recycling plant at no additional cost.

Sending People:

- Whenever possible take the train. It may be slower than a car during certain times but during rush hour is faster than driving, and you can catch up on work or emails safely while on a train.
- Buy carbon offsets. Now buying carbon offsets are easier than ever. When purchasing on travel sites such as www.orbitz.com, you can buy carbon offsets with the click of a button, easily added to your total.
- Be a one car work "family" Institute a policy of car sharing when on company travel such as a minimum of two people share one rental car. This is often easier to do on business travel when people are working at one facility on one project.
- Hold virtual reviews to avoid flying reviewers in for a day or two from all over the world. This will save you both labor and travel costs.
- Move your office near public transit and offer incentives to employees that use public transit, such as offering a travel allowance (many of which are US tax deductible).
- Partner with car-share companies such as ZipCar.com, CityCarClub.co.uk, and igocars.org to provide your employees with options to travel quickly but not consistently use a car.
- If you provide company cars to your employees, you receive extra US Federal tax credits for electric or hybrid vehicles. See fueleconomy.gov for more information.



CO_2 Emissions by Mode of Transport

production resources is essential. Ask for their "greenest" options and test those options to confirm you still like the quality. You may need to modify colors to print on a non-bleached paper or find heavier paperstock to print double-sided and still achieve the ideal look for delivering your message. Do not try and switch your standard paper quality or inks right before a big project—test, test, test. If your printer is unsure of the options that are best for you, share this scorecard and begin that dialogue. These options are no longer prohibitively expensive and many printers are making greener paper stock their standards rather than an alternative for clients. Some government agencies and large commercial companies may offer incentives to submit deliverables on FSC-certified paper or for other eco-friendly or electronic document initiatives. Talk to your clients and find out what they might be interested in learning as well. Most likely they do not know which options can be requested.

Words mean more than what is set down on paper. It takes the human voice to infuse them with deeper meaning.

–Maya Angelou

Paper Basics

When you buy a ream of paper from your local office supply store there are a lot of details that can seem overwhelming. Here is a break down of how to understand that information and buy the most appropriate and environmentally friendly paper.

Paper weight is measured in pounds and typically shown using the # sign or "lbs." The higher the number, the thicker the paper is physically. 20lb paper is a typical weight used on regularly printed items such as emails or rough drafts that are in black and white. 28lb paper is a good weight for printing full color items and has a professional feel to it. 28lb paper is also ideal for printing double sided in full color. Printing on a lighter (lower numbered) paper stock may cause colors to bleed through and does not provide the most professional product. If all your paper is loose and you cannot see what weight it is, rub the paper between your fingers. You will feel a slight but appreciable difference in thicknesses.

The label "recycled paper" does not immediately guarantee that the paper is 100 percent recycled. Paper can be considered recycled if it contains as little as 10 percent recycled materials. When choosing paper, try to find as high a percentage as possible. The recycled nature of the paper will have no effect on how your color will be printed or the amount of bleed through when printed double sided. The weight of the paper is the biggest determining factor in double-sided bleed.

All office standard paper is white, right? Paper comes in a variety of whiteness measured (in the US) on a scale from 90-100 and in Europe from 104-112. Higher numbers are brighter white, and your images and text may appear crisper. However, brighter whites, unless otherwise specified, require more chemical processing and are more damaging to the environment.

FSC-certified paper is available in many office supply stores and will most often be one of many environmental details on a ream of paper.

Generic or store-brand paper, like many generics (cereal, pharmaceuticals, etc.) are the same or very similar to the name brand.

For regular laser printer/office use:

- Pick a 90 whiteness, 100% recycled, FSC-certified, 20lb, store-brand (such as Staples) paper.
- Cost: ~5-10% more per case than non-eco friendly. Less if you buy more than 5 cases of paper at a time.

For printing proposals, presentations, and other reports or brochures:

- Pick a 92-96 whiteness, 100% recycled, FSC-certified, 28lb paper, store-brand (such as Office Depot) paper.
- Cost: ~5-10% more per case than non-eco friendly. Less if you buy more than 5 cases of paper at a time.

Most office supply stores also offer helpful logos specifying eco-friendly so you can just click to find greener products. When in doubt, type terms like "FSC" into their online Website searches or ask in-store clerks for assistance.

SUSTAINABILITY SCORECARD

	SOURCE	ENERGY IMPACTS	DENSITY
PREFERRED +	Made from stainably harvested, renewable resources; no known toxicity	Made with renewable energy; very moderate embodied energy	Fully recyclable; fully compostable; reusable
CAUTION !	Made from coventional renewable resource	Made with nonrenewable energy; low embodied energy	Compatible with incineration
AVOID	Made from nonrenewable resouce; known toxic impacts	Made with nonrenewable energy; high embodied energy	Requires conventional or hazardous waste landfill

PAPER

PAPER	Source	Energy Impacts	Density
Post-consumer recycled fiber	Preferred	Preferred	Preferred
Pre-consumer recycled fiber	Caution	Preferred	Preferred
FSC certified virgin fiber	Preferred	Caution	Preferred
Conventional virgin fiber	Avoid	Caution	Preferred
Alternative agricultural fiber	Caution	Preferred	Preferred
Agricultural waste fiber	Preferred	Preferred	Preferred
Plastic laminated paper	Avoid	Caution	Avoid
TCF/PCF bleaching	Preferred		
EFC bleaching	Caution		
"Wind-powered" paper		Preferred	

PLASTICS

PLASTICS	Source	Energy Impacts	Density
#1 PET	Caution	Caution	Caution
#2 HDPE	Preferred	Caution	Caution
#3 PVC	Avoid	Caution	Avoid
#4 LDPE	Preferred	Caution	Avoid
#5 PP	Preferred	Caution	Avoid
#6 PS	Avoid	Caution	Avoid
#7 Other Plastics	Avoid	Caution	Avoid
Biopolymers (non-GMO)	Preferred	Preferred	Preferred
Biopolymers (GMO)	Avoid	Preferred	Preferred

INKS

INKS	Source	Energy Impacts	Density
Petroleum inks	Avoid	Caution	Caution
Vegetable inks	Preferred	Caution	Caution
CMYK pigments	Preferred	Caution	Caution
Most spot pigments	Preferred	Caution	Caution
Metal-containing spot pigments	Avoid	Caution	Avoid
Metallic pigments	Avoid	Caution	Avoid
Varnish	Preferred	Caution	Caution
Aqueous coating	Caution	Caution	Caution
UV inks	Caution	Caution	Caution
Foil Stamping	Avoid	Caution	Avoid

BINDERY

BINDERY	Source	Energy Impacts	Density
Mechanical bind (saddle stitch)	Preferred	Caution	Preferred
Mechanical bind (singer stitch)	Preferred	Caution	Preferred
Perfect bind (PUR hot melt)	Caution	Caution	Caution
Perfect bind (EVA hot melt)	Caution	Caution	Caution
Starch adhesive	Preferred	Preferred	Preferred

Dougherty, Brian. *Green Graphic Design*. Allworth Press. New York. 2008.

AUDIT TEMPLATE

Office Materials

Paper, # of pages printed per month: ____________

Toner, # of cartridges used per month: ____________

Is double-sided printing standard ....yes/no

Is printer coding enabled ....yes/no

Recycling

Do we have a policy (bottles, cans, paper) ....yes/no

– Can that policy be expanded/improved ....yes/no

Do we use a document destructor who recycles................yes/no

Travel

How many miles do your staff/team drive monthly: ____________

– Is public transit accessible to your office........................yes/no

– Do you offer incentives to use public transit ....yes/no

– Do you offer incentives to car pool or ride share ....yes/no

How often is your staff traveling non-locally
(more than 50 miles from your office): ____________

– Can other staff be upskilled to avoid travel ....yes/no

– Can meetings be conducted virtually ....yes/no

What virtual tools do you have: (list)

Do you offer incentives or the opportunity for staff to work virtually or from home...yes/no

– How often can staff work from home: (hours/days) ____________

– How often do staff work from home: (hours/days) ____________

Shipping

How often do we ship overnight or
two-day express: (per month) ____________

Do we use bio-degradable packing materials ....yes/no

How much money do we spend on overnight
or two-day express shipping: (per month) ____________

Production

Do we use a green designer..yes/no

Do we use a green printer...yes/no

Marketing

Are we promoting our efforts
to be environmentally friendly..yes/no

– Do we know how to promote our efforts........................yes/no

How many brochures or other printed
material do we throw away every year
or every new marketing cycle: (quantity) ____________

Do we have an online presence.....................................yes/no

– Can we create an online presence (website,
social media, blog, etc.) that would take the
place of printed materials...yes/no

Sales

Are we talking to our clients about their efforts
to be environmentally friendly..yes/no

Do we know their initiatives...yes/no

– Are we helping their initiatives ....yes/no

– Could we do more...yes/no
(explanation)

____

____

____

Budget

Are we prepared to pay up to 20% more for materials.......yes/no

Are we prepared to research
the best use of our materials:
(number of hours dedicated to research) ____________

Are we prepared to rethink the way that we
spend money and spend more money on less but
higher quality or more appropriate materials ....yes/no

Are we committed to educating our staff
(brochures, email blasts, meetings) on our
efforts and how they can get involved ....yes/no
(explanation)

____

____

____

What the world really needs is more love and less paper work.
—Pearl Bailey

cut here (best to use an exacto)

eco-tips

Hire a green designer. Coordinating the efforts needed to know every option for optimal "greening" of your marketing or proposal materials is difficult. Use the AIGA Website to find local resources. If you need to do it yourself, attend an AIGA event. All events are open to the public and typically require only a small fee for non-members. The AIGA is not the only resource, searching the Internet for "green printers" or "green designers" will quickly list a number of resources in your area.

Keeping Up with the Jones'

All this information is overwhelming. But what are real people doing? Can we easily follow their steps?

Becky Eason started Eason Associates in Washington, DC in 1979. After attending a seminar by Derek Smith and Associates in 2006, a company that provides "consulting, speaking, training, and the development of environmental philosophies and policies, which all seek to combine profitability and social responsibility through environmental reform" or more succinctly shows everyone in a corporation how "green is good for business," she decided to radically change the way she was supporting her clients. Many people make small changes and may recommend green alternatives to their clients or lead by example by choosing those alternatives in their own materials. Not Eason Associates.

They held their first green meeting with their clients in 2007 and explained how Eason's philosophy and way of doing business was changing, and how they wanted their clients to join them in this radical shift. Eason Associates only works with clients who either are or are making strides towards being ecologically friendly and doing sustainable initiatives such as buying carbon credits to work towards being carbon neutral, starting recycling programs, and making other mindful changes to positively impact the world around them. This radical shift did not lose the company any business; in fact it created an important niche for them and has increased profitability.

Becky and her team have since become green pioneers in the design space. They are switching to more environmentally friendly paper solutions and going all the way to the "seed" of that design avocado. They are changing how to visually communicate ideas and create a more mindful and direct way to produce marketing materials. They have been featured in *Adobe Magazine* (the de facto software giant for the design industry), the *Washington Business Journal*, the *Washington Examiner*, *Deliver Magazine,* and *RIS Paper* newsletter as heralds of the coming green age in design.

To get a real-world perspective on what other companies and designers are doing in 2010, I chatted with Beth Lacey Gill. Beth is the Vice President and Sustainability Chair of the Baltimore Chapter of the AIGA (the American Institute of Graphic Arts is the original name but since 2005 the organization is known only by its acronym). AIGA is the professional association for design. It stimulates thinking about design, demonstrates the value of design, and empowers the success of designers at each stage of their careers. This national group hosts learning and networking events for creative professionals of all kinds and has chapters around the country to support a wide base of issues and challenges.

Beth is committed to being green. She is the Senior Editor at Enterprise Community Partners, a sustainable housing non-profit that helps people move "up and out" of poverty. She is so committed to being mindful of her environment that when she left her previous position, she checked the green credentials and missions of all the companies she applied to. Beth is part of a generational shift to being more mindful in both personal and business life. If your company is not making strides to becoming more eco-friendly, you may not be attracting top talent. Generation Y, more than any other generation, is considering the social initiatives and

Think globally and act locally.

4 Easy and Immediate Steps

1. Audit your processes. Do you know how much paper you use in a month? How much toner? Do you recycle anything in your office? Do you use a document destructor that recycles? How many miles does your staff travel to the office every month? Find your levels using the audit template (at left) and commit to using 10% less in every category. Try that for one month. If you can cut back to 20 percent, do it.
2. Be mindful every day and see ways to use less, waste less, and impact your world less.
3. There is little cost difference in using eco-friendly paper—order your first new case today.
4. Communicate your desire to green your office and policies to your staff, your vendors, and your clients. You will be surprised how many people can contribute to your efforts or who many come to you for help.

moral perception of a company rather than a higher salary and a corner office.

Beth pioneered the first AIGA Baltimore green event in 2007 and met with strong resistance from the board who thought that the event would flop. Now three years later, the Baltimore Chapter hosts at least two green-themed events per year and the national organization has a virtual center for Sustainability (all other chapters are linked to a geographic area, typically a large city). To specifically address questions on how to go green: http://sustainability.aiga.org/.

Only government can take perfectly good paper, cover it with perfectly good ink and make the combination worthless.

–Milton Friedman

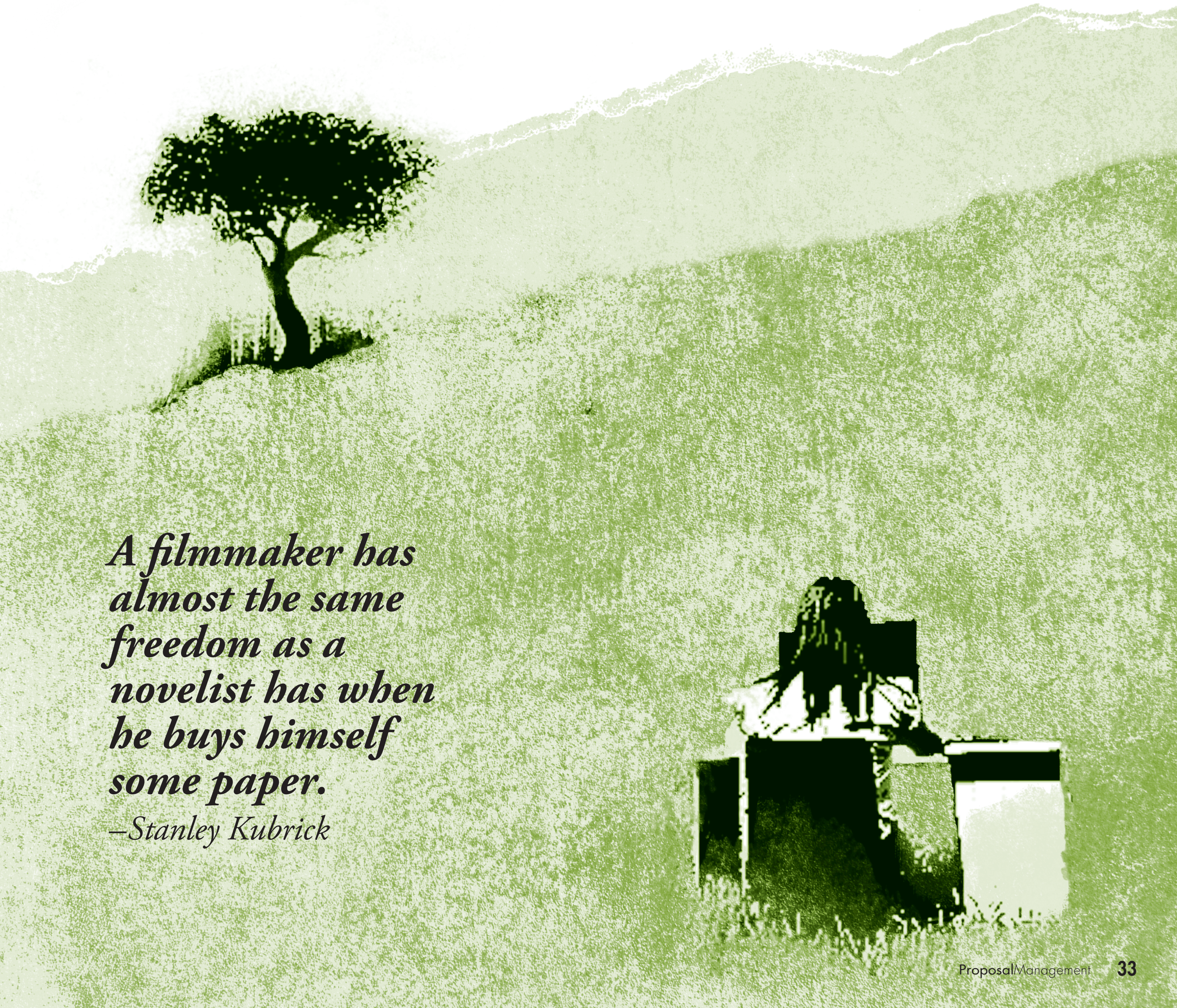
The Sustainability Center has shocking statistics about the nascent green movement. While the media seems to be flooding the print and digital universe with green, green, green, no one is really sure what to do, particularly in the design arena: "And while 87 percent of recently surveyed AIGA members view sustainability as a top priority, many of them confess they are ill-equipped to apply its principles effectively. Sustainability is complicated. The decentralized nature of resources, the complexities of the issues and the lack of filtering for how they relate to design appear to be the main barriers for turning motivation into action. Everyone wants to do the right thing, but no one relishes attacking this knowledge hairball" (sustainability.aiga.org). Networking and educational seminars and meetings such as the ones the Baltimore AIGA now hold twice a year help designers find green answers and are making it easier to implement green initiatives.

Stacy Ross, Lead Graphic Designer of Mjachs Design, a small woman-owned business also in Baltimore and also a member of the AIGA Baltimore, always recommends at least the minimum green paper option for her clients: "We quote FSC certified paper no matter what the client requests now. There are all different kinds, so no matter what printer we use, we can typically get something that is earth friendly (even if it's not FSC certified, often it's at least partially recycled content). When we first started doing this, we would ask our clients if they would like to use FSC-certified paper and FSC-certified printers, and more times than not, they would say yes. But typically, we just quote an FSC paper without our client even knowing about it now [they] just expect that of us now." Using FSC-certified paper at a traditional print vendor (for things like business cards and brochures) may result in a 10-20 percent markup. However, buying paper in bulk from your favorite office supply store can result in only a 5-10 percent markup depending on the exact weight of the paper and quantity of recycled paper.

Beth believes that even small steps are empowering and likens the green movement and our individual understanding of it to the civil rights movement, citing how quickly words that were once common to describe groups of people have all but vanished, at least in polite conversation. I have frequently heard that it takes at minimum of two generations to change a commonly held social belief or norm. Previous generations wrestled with women's right to vote, once a complex and contested issue that is now commonplace with its struggles all but forgotten. While these are extreme examples, there are generations of children growing up without having to question their ability to hold certain jobs because of their gender, their race, or their socio-economic background.

The Future is Now

We are a family-friendly company. One day, one of my colleagues brought two of his young sons into the office. I happened to be in the kitchen and silently helped his youngest reach the faucet to wash his hands and then handed him a paper towel to dry them. He looked up at me solemnly, held out the dirty paper towel, and said, "I think this can be recycled." One day all of our choices will be mindful choices that account for our effect on this planet, whether that effect is waste, energy efficiency, sustainable



A filmmaker has almost the same freedom as a novelist has when he buys himself some paper.

–Stanley Kubrick

practices, or other green things. Our lives will not even be concerned about being green, the movement will have become the norm and our children will be the ones who forget our struggles of changing old habits and creating new.

For now, pick one or two things that you as a person and your organization as a whole can do to start effecting positive change and start doing those things now. That may be an audit as to the usefulness and possible wastefulness of your marketing campaign, or a commitment to print internal communications double sided or on non-bleached, recycled paper. Maybe it is talking to your customers about their requests for multiple printed copies and recommending creative, electronic solutions that may tell your story and sell your solution more effectively.

You may pay more for materials that are eco-friendly. However, after you have audited or rethought about the quantity of consumables you waste, you will spend less overall. This requires labor to research and initial replacement costs to update your office with more expensive, green materials. You will see the bottom line "black" benefit of going green but you may have to go into the "red" on your current budgets for the first month or first year to make the switch. You will reap the rewards monetarily and do your part to provide a better world for your clients and for your children. It will not happen overnight and it may not be easy for everyone on your team to change their familiar habits. Have patience—it is worth it.

Try not to be overwhelmed. It is never too late to start, and no change is ever too small.

RESOURCES

Web:

http://www.paperleadership.com – Derek Smith and Associates, the company that helps show how green can be good for business through trainings and consulting

http://sustainability.aiga.org/ – free, online resource for design-specific questions and events all over the country that focus on how to go green

http://www.easonassociates.com/ – DC-based firm that took a giant leap forward to green their business and that of their clients

http://www.enterprisecommunity.org/ – non-profit organization that helps lower income individuals and families afford environmentally friendly homes in sustainable communities

http:/ www.fscus.org/ – Forest Stewardship Council (FSC) is a non-profit organization devoted to encouraging the responsible management of the world's forests

http://www.greenbiz.com – good, general resources

http://www.pneac.org – Printers' National Environmental Assistance Center

http://www.adobe.com – design-specific resources

http://www.greenbiz.com/news/2009/05/21/us-government-wastes-over-440-million-year-printing-report

http://ec.europa.eu/environment/climat/emission/index_en.htm

Books:

Dougherty, Brian. *Green Graphic Design*. Allworth Press. New York. 2008.

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Author Bio

Colleen Jolly, APM.APMP, is a Principal at 24 Hour Company and Managing Director of 24 Hour Company UK—a global proposal graphic and production company. She has won thousands of proposals in the past 10+ years. Ms. Jolly is responsible for book composition/cover design for the APMP *Journal* and regularly contributes articles. She is a frequent worldwide speaker and trainer, presenting at many APMP conferences. She is a graduate of Georgetown University, and is active in leadership roles in many arts non-profit organizations. Ms. Jolly is an award-winning fine artist and business professional, is Secretary of the APMP NCA Chapter Board and coordinates the APMP Visual Communications (Graphics) Special Interest Group/Community of Interest. She can be contacted at colleen@24hrco.com or colleen@24hrco.co.uk.

TALK TIME with

jon williams

Proposal Management catches up with the globe-trotting Jon Williams, a dynamic Fellow with ragged goatee, sharp focus, and discerning wit.

By R. Dennis Green

> "Newer members may not appreciate your many contributions to APMP and its international growth."

Like many in the APMP community, I first came to know Jon Williams in the late 1990s as that charming Brit who joined us at APMP annual conferences. For me and what was then a US-centric organization, Jon's view of our profession and his vocabulary seemed askew. It was not just his Liverpool and Oxfordshire-tinted accent. Nor his word choice and slang—both decidedly unique and creative. It was also his gift for storytelling. In presentations, for example, he counseled buyers to avoid the "Harry Potter syndrome" (veiling procurements in misleading, unhelpful secrecy). Addressing sellers, he cautioned not to write Benedict-style proposals, a reference to his then very-young son Benedict's first words: "Me, me, me, me!"

As years have passed, we have watched Jon nurture APMP's global tentacles. If you marvel at the growing list of countries where APMP has a presence, know that such marvels are not an accident. One big enabler is typically Jon's push.

We also watch as he nurtures a groupie-style following, often in tandem with colleague BJ Lownie, wowing a growing and raucous fan base of annual conference attendees with their happy, provocative presentations on the state of proposal arts.

There is much to the man—much worth knowing and much worth chatting about. His observations can range from drop-dead silly to sagacious. He proved a terrific interview, as we found in this virtual chit-chat. We caught up with Jon at airports and stops between Oxfordshire, Amsterdam, the Netherlands, and points in between.

JW – AT A GLANCE

Full Name:
Jonathan "Jon" Charles Williams

Position:
Managing Director,
Strategic Proposals Limited

Avocation:
Writing fiction—both Websites and two published books

Birthplace:
Liverpool, UK, on
28 December 1967

Home: Oxfordshire, England

Countries Visited:
79 (ambition to reach 100)

Favorite Places:
Liverpool, London, Kyoto, Vienna, Venice, and Langkawi (Malaysia), "all magical."

Hobbies: travel, fine wine, good food

Favorite Time in History:
Early 1800s. (And yes, the romantic has period costume: tight-fitted breeches, Hessian boots, standing collar, and cutaway coat with tails.)

APMP: Newer members may not appreciate your many contributions to APMP and its international growth: the fact that you single-handedly launched the organization's first and largest international chapter (UKAPMP), officially chartered in 2001; received our worldwide leadership award the following year; and earned the merit of APMP Fellow in 2006. All while building and supporting a busy proposal consultancy.

How do you do it, Jon? What is your secret? When, if ever, do you sleep?

JW: I wouldn't say single-handedly! Chris Whyatt and I jointly came up with the idea to launch some form of proposal network in the UK. But I'm happy to take all of the credit, even if it'll mean I owe Chris a beer.

I guess most people who thrive in proposal careers quickly learn that sleep is over-rated! Juggling tasks can be interesting at times—trying to align the fun stuff I do proposal-wise (helping clients, running and growing a business, contributing to APMP, writing the blog) with the fun stuff I do outside. The secret, I think, has been to try to engineer a career and lifestyle in which I love the things I do—if it doesn't feel too much like work, then it's less stressful.

APMP: What compelled you to hook up with the young, fledging APMP organization? At that time, in the late 1990s, it still had a US-focused centricity. Also, in spite of a common language, our professional terms are not always the same.

JW: I blame BJ Lownie! He and I had been working together for a while, and he'd mentioned APMP. So when we thought to set up something in the UK, it seemed logical to link. That, and it's meant I've had the opportunity to visit all sorts of fascinating places in the US for conferences that I'd never have seen had we simply gone for the Brits-only route!

As for terminology: I do think there's something of a challenge there for APMP, but less from a US versus international perspective than from a government/defense versus commercial angle. The competency definitions in APMP's professional accreditation program are very skewed towards government/defense bidding—almost as if their processes are somehow the right ones—or inherently superior to those working in the commercial world (where I spend most of my time). I know that reflects APMP's origins, but the program needs to evolve in a way that honors the great work that goes on in so many commercial proposal teams, without somehow implying that "big government bids are best" and we lesser beings should dance to their tune.

APMP: As someone so actively involved in APMP's international expansion (now with nine international chapters), do you see fruits in this expansion? Lessons learned? Proposed next steps?

JW: I take the blame for a fair few of those newer international chapters, having helped set up the Dutch chapter, given the first presentation for APMP in Australia, and so on! (Hey, it's good for the air miles, right?). I tried to get things going in China, too, but that didn't quite come off at the time.

I really do value APMP as a focal point for sharing best practices—and love swapping tales and tips with my fellow professionals. So, if we can bring an international perspective to that, moving APMP away from its roots as a US organization into one that promotes the profession on a genuinely worldwide stage, then so much the better.

Language is clearly a challenge—as is transport. Wouldn't it be good to have the APMP conference in, say, India one year, with all of our fellow proposal professionals there? We're currently piloting APMP-Foundation™ courses in German, with our good friend and partner Chris Kaelin (from the DACH chapter). I can sense real pressure (and opportunity) for the association to produce non-English variants of particularly the Foundation Level exam—if a financial case can be developed for this, recognizing that APMP is a not-for-profit organization and that resources are scarce.

And I know some international chapters have been pushing for a bigger share of the financial pie (i.e., for a greater proportion of the membership dues to be returned to them). Frankly, whilst I

> *"I really do value APMP as a focal point for sharing best practices, and love swapping tales and tips with my fellow professionals."*

Sheraton – Bangalore, India. Jon hard at work.

do think APMP needs to share financial details openly with its members, APMP invested so heavily (in time and financially) in helping the international chapters such as the UK to get off the ground, that I think this is less of an issue than some have made out.

Final challenge for the international chapters? Penetration of their markets is still relatively (and understandably) low in terms of the percentage of proposal professionals who are aware of, and who have joined APMP. There's a great opportunity there for growth.

APMP: As someone who, reportedly, has worked proposals in 20 countries, you have what may be a rare but important experience base. For fellow APMP members with growing demands to work with partners, clients, and customers in other countries, can you share a short list of how-to-cope recommendations, lessons, or tips?

JW: Fly as cheaply as possible; stay in the nicest hotel you/the client can afford; and always engineer time out to spend time visiting the real city (not just the airport, hotel, and office)!

More seriously, I'm always very conscious of not wanting to force my view and experience of the proposal/procurement world onto other cultures. I'd argue that there's a very strong (80 percent+?) core of best practice that can be applied consistently between countries; the secret is to honor the fact that there will be local/cultural differences, and (working with the right people locally) to tailor one's advice and working practices accordingly.

When training, there are certainly techniques I use around language (less colloquial, sometimes more straightforward word choice), design of materials (fewer words, more graphics, more supporting notes), delivery (even if I get so passionate about the subject that it's sometimes hard to slow down), allowing more time for discussion and clarification; course length (allowing 25-50 percent more time to deliver the same material, given all of the above).

That said, a lot of our international work is with multi-national clients who are bidding into English-speaking prospects in North America and the UK, and so the challenge is often to help them to understand the best way to influence evaluators in our geography rather than in theirs.

Language-wise, the US is actually the biggest challenge for me as our use of English is so similar—yet so subtly different. I do find when I'm talking to BJ that I need to slow down my speech, use simpler words, and so on. (Joke!)

APMP: Speaking of language, and simple words, we were nearly struck dumb in astonishment recently while reading the Strategic Proposals company brochure. It wasn't the depth of services you offer, of which there are plenty, or the innumerable testimonials to your company's good work. Rather, it was the brochure's uncommonly realistic profile of win rates. Instead of promising the exorbitant 80-100 percent win rates touted by many proposal professionals, you profiled before/after win rates ranging from 12 to 50 percent. So, of course, it begs the question: does this level of candor hurt you in an industry where competitors often self-attest to win rates as high as the sky?

JW: Actually, where clients implement full improvement programs with us, their win rates very regularly do rise into the 70 percent and 80 percent levels—we have case studies of that in numerous industries and numerous sectors. And, frankly, when one head of proposal management proudly boasted to me that she'd hit a win rate of 92 percent after we'd worked pretty extensively with her team, I pointed out that they were probably not being brave enough—and needed to start to attempt to capture a few more challenging, edgier deals!

Jon, fully caffeinating for his busy day ahead.

But not all clients have the financial resources, or the ability to add new staff, or the sponsorship at the most senior levels necessary to fully embrace every facet of best practice (at least in the short term). They'll prioritize from a shopping list of things they'd love to do—and still see very significant improvements in proposal quality (and hence win rates). So when (for example) one of Europe's leading IT services companies took their win rate from 12 percent to 33 percent by letting us train 700+ salespeople and subject matter experts, that reflects a pretty spectacular return on investment—even though they weren't able (at the time) to restructure their entire bid/proposal management function. Or when another client doubled win rates from a starting point in the low 20 percents, by training their proposal staff and having us coach them on a proportion of their live deals over the course of several months, the benefit was phenomenal compared to the cost of the program. You can have an exciting journey, even if your budget doesn't quite stretch to a full-blow trip to Shangri-La!

APMP: Another thing that distinguishes you—both you and business partner-colleague BJ Lownie—vis what I'll gamefully call your secret weapon. Something you bring to every assignment, every training session, every APMP conference appearance…

Know what I'm thinking?

JW: Listen, this interview is supposed to be about me, right? I'm getting sick and tired of that panda stealing the limelight. Next time that bear gets back to the UK, it'd better bring security with it for its own good…

Erm, where was I? So, a couple of years back, BJ and I decided it'd be amusing to come up with a way to link together proposal centers around the world, and so Proposal Panda arrived on the scene. The idea's fairly simple—any team can ask to host the panda for a week, take some photos and write up a short entry for The Proposal Guys (our blog). Thus far the bear's traveled pretty extensively across the US, UK and into Africa—with plenty more hosts lined up wanting a visit. It's a simple (some might say silly) idea, which seems to have managed to entertain and motivate the teams who've joined in, whilst readers on the blog seem to like the little insights into their peers' working lives.

Sadly, panda wasn't with us the last time I ran a program in China in 2005. I'm looking forward to arranging a homecoming celebration on my next visit there…

APMP: That—Proposal Panda—was not the secret weapon I had in mind, though he is undeniably charismatic and cute to the point of distraction.

Sense of humor, strategically applied, is what came to my mind. You and partner BJ seem to have this wonderful quality and, in the context of proposals, know how humor is best applied. How did you two come by this talent? Is it something that can be learned?

JW: I think US audiences always find Brits funny: must be something to do with the accent! And it's said that humor is built into the DNA of folks from Liverpool, where I'm from.

I've always enjoyed public speaking and entertaining audiences—I was the UK's national debating champion at school, for example. I was fortunate to work with several inspirational figures relatively early in my career who used humor as part of conveying their message: John Garnett, for example, the director of The Industrial Society (an educational charity for which I worked for a year after graduating), and Izzy Gesell (an expert on using improvisational comedy in the workplace, with whom BJ and I have worked regularly).

It's always struck me that it's better to engage the audience with humor, to share anecdotes to which they can relate, and thus to make them more receptive to the serious underlying points. Much as BJ and I love the laughter that our sessions at APMP and other conferences generate, we do love it too when people tell us they've found the underlying messages inspirational in helping them to improve

The true star of Strategic Proposals—the well-traveled, Proposal Panda.

their and their organizations' proposal capabilities. And, of course, we have more fun if the people around us are enjoying themselves as well as learning and achieving great things.

APMP: Proposal development environments, we know, are typically high stress, what with teams assembled to solve difficult problems and document persuasive solutions against deadlines unreasonably short. That sense of humor you bring can be a wonderful, strategic salve.

Looking at the bigger picture, what, in your opinion, are the best practices (or secrets or tricks) for managing and mitigating stress?

JW: Avoid it in the first place! Too many proposal teams work re-actively—almost as back-office factories, churning out documents to tight timetables once a customer's RFx has arrived. That's why I get so passionate about pre-proposal planning—the proposal team engaging on an opportunity as soon as it's a realistic twinkle in the salesperson's eye. It's so much better if the entire process—the customer's requirements and decision-making criteria—is wired in your favor. It's so much easier if your proposal is sown onto fertile ground, with stakeholders who are already pre-disposed to select you. It's so much less hassled if you can engage colleagues in advance, plan your collective time, develop some content prior to the RFx showing up.

"One of our tricks of the trade is to understand, early, what makes each proposal team tick—and how they react under stress."

But, of course, a degree of stress is inevitable in a trade with tight timescales, fixed deadlines, and multiple (often uninterested) participants. One of our tricks of the trade is to understand, early, what makes each proposal team member tick—and how they react under stress. That way, you can keep an eye on people; talk to them regularly; spot if they're struggling—even before they realize they're in danger of missing deadlines or becoming overwhelmed.

Creating the right physical environment is key, too. I recall setting up the Strategic Bid Centre space at Compaq in the late 90s—brightly colored walls, comfortable sofas for side conversations, floor-to-ceiling whiteboards, cuddly toys in the war rooms. It was so much not what people expected to find when they came to work on a proposal that it jolted them into a different way of thinking and behaving. That, combined with a view of the proposal manager as a leader—inspiring the team to want to win, rather than merely producing a standard document on time—changes the whole dynamic of the proposal effort.

APMP: Another component of our profession, one with both good and bad repercussions, is the influence of technology. It has, for example, allowed us to capture and manage massive databases, to catalog and index re-use data, to link and coordinate geographically disbursed proposal teams, and, in some progressive companies, offer fully automated, holistic proposal generation engines for a global sales staff. However, with every advantage come technical challenge, certain expense, and attendant risk.

In your experience and practice, which technologies are most helpful?

Which do you embrace?

How do you ensure that the technology is driven wisely, that technology doesn't drive you?

JW: Coincidentally, I was discussing this very topic on the APMP group on LinkedIn just yesterday. Ours is certainly a profession bubbling with new ideas, and I'm forever being sent details of the latest cool software package that will revolutionize every proposal center's work, reducing costs, taking win rates sky-high, and ensuring everlasting world peace.

The danger, of course, is that unless you're clear on your business requirements, and have a sustainable process for using the technology wisely, all you'll do is write poor proposals faster.

That said, I'm far from being a Luddite, and have been involved in numerous successful implementations. I'd see there as being four main areas in which specialist technology can bring real benefits:

1. Handling structured libraries of pre-written content, from which you can extract proposal material quickly, flexibly, and in a professional-looking format. If your primary needs lie in this area, that would tend to point you towards one of the long-standing players in the market (e.g., Kadient/Pragmatech, Sant).
2. Pulling together relevant material from across the organization as a whole (e.g., the good practice contained in documents developed whilst delivering projects for clients, rather than just pre-written content specifically developed and held for proposals). This would tend to drive you towards an intelligent search product such as Cara's Proposal Supporter.
3. Improving the process for building your document—when Xait Porter, born originally out of the energy sector, really is excellent. (Highlighters are also good for teams wanting to mark up comments on documents as you develop them.)
4. Producing far slicker and more professional electronic submissions, in which case, a product such as Concurrence can make a huge difference (especially, with some of their newer features that allow you to tag proposal text so that evaluators can dice the proposal by question/section, evaluation criteria, and win theme).

"I foressee (and am already starting to get involved in engineering) far closer links and understanding between purchasers and proposal folks."

APMP: Technology effects procuring agencies and customers just as much promise as bidding contractors. It effects both process/procedure and the customer statements of work. Its influence is reflected, for example, in the increased use of electronic proposals, automated scoring, and direction to use specific application tools. In this context…

What trends do you see evolving?

How have you and your clients adapted to these trends?

JW: All too many buyers have embraced "e" procurement tools as if they were a universal panacea—often, if I'm blunt, to mask their inability to run "traditional" RFx-style processes effectively, and to avoid them having to actually talk to suppliers. After all, it's so much easier for them to hide behind a document exchange process, whether that's conducted in hard copy or electronically. And if an electronic application can write the spec, receive the responses and do the scoring, it doesn't say much for the supposed skill and value-add of the purchasing function!

That said, we work pretty closely with some of the leading lights in the procurement community, and undeniably electronic tools have their place in certain categories of spend. But in our recent survey, "The Buyer's Guide to Bidding," one chief procurement officer noted that he'd saved his company five times as much money via the intelligent use of RFPs than his peers in comparable areas of his company had done via e-procurement.

However, does it matter to the bid team whether their submission is online or in bound volumes? Of course, it changes the document management aspects of the project—and may have an impact on negotiating tactics (especially, how much room one leaves to maneuver post-proposal on price). But too many times teams get blinded by the electronic tool, and seem to forget that the key principle of superbly articulating a compelling story still applies—with the importance of engaging the client early to shape their spec even more critical than in traditional scenarios.

APMP: I recall, perhaps 10 years ago, as electronic procurements and tools became more commonplace and efficient, that some APMP members predicted a diminishing need for their services. Ten years hence, the profession has adapted. Proposal professionals are as critical today as they ever were. But changes abound and wiz-bang software apps keep evolving. Is there any reason to worry? What changes/trends do you see in the years ahead?

JW: In many ways, as I look round our clients' offices and see people working to deliver the contracts we've helped them to win, I see proposal work as the "job creation engine" for companies. As such, it's quite essential to organizations' future success.

Yet I think we've hardly started, as a profession. So many proposal centers "especially in the commercial world" struggle to command the necessary respect and attention at board level. So many proposal operations are under-skilled and under-resourced working too many hours chasing too many improbable deals. So few organizations genuinely embrace proposal management best practice—but those who do reap amazing benefits.

So I'm optimistic. I see the decade ahead as one of tremendous growth for our profession. Certainly, our world will evolve, when will the first proposal evaluation "app" appear? Younger buyers coming into client organizations will have grown up in the Internet age, and will be far more comfortable and adept at reviewing information on their screens and online.

There's a dearth of tools to steer teams through the proposal process as a whole, a client once told me that they wanted "Jon Williams in a box": a software package that would replicate and coach them through what I'd do at each stage of the proposal process. There's nothing out there of that ilk—yet.

I see new influences coming to bear on the way we create proposals. We've been working closely with Mark Jones, an award-winning journalist, to explore what our world would be like "if magazine editors did proposals." Proposal management, traditionally, evolved from program management disciplines: I can see far more of a publishing ethos creeping into our profession, with higher-caliber specialist writing and design skills, coming to the fore.

And I foresee (and am already starting to get involved in engineering) far closer links and understanding between purchasers and proposal folks. Too many buyers treat the RFx process as an exam for potential suppliers—and end up choosing the least bad proposal they receive—rather than engaging their bidders creatively and holistically, to end up choosing from a range of excellent propositions. I'd like to see discussions and debates between the two professions, across the buyer/seller interface, becoming far more commonplace.

APMP: Returning to the best practices theme, and acknowledging your earlier reference to most companies' restricted

POINT — COUNTER-POINT

Jon William's partner-in-crime-and-comedy, BJ Lownie, is invited to dish some dirt.

APMP: In the words of John D. Rockefeller, "A friendship founded on business is a good deal better than a business founded on friendship." Would you attribute that kind of distinction to the shared success of Jon and yourself?

BJ: I can state with confidence that my working with Jon has been one of the greatest highlights of his career. I tell him that all the time.

Our relationship was one of "love at first opinion." We met when he was a purchaser for Barclays Bank and I was heading up a proposal effort for Compaq, which was submitting a proposal to the bank.

At our first meeting, Jon and I immediately connected, recognizing each other as kindred spirits who looked at things slightly (okay, maybe very) differently than the other people involved.

Jon came to work for Compaq with a remit to develop a proposal center. He brought me in to support him. We had great fun working together and did some "really cool things," not the least of which was the proposal center he spoke of with the creativity centers, writing rooms, etc.

When Jon decided to go independent, it only made sense for him and I to bring our two companies together. It's been twice the fun ever since.

APMP: It's no secret that you and Jon have a growing fan base of groupies for your conference presentations. Whatever you do, they're always infused with irony, wit and surprise. Is Jon truly funny or does he just hijack your shadow's glow?

BJ: Jon has lots more groupies than I do, but then he has the advantage of that Paul McCartney accent that seems to drive the ladies crazy.

Yeah, it does seem we have a few fans. I recall Jon relating to me what happened when he got on an elevator with 4 or 5 women at an APMP conference. As soon as he enters, one of the women tells him, "I just loved Proposal Idol." Another follows with, "I think the Proposal Fairy Tale was the best." Still another adds, "The Church of Proposal Excellence is my favorite one so far." Of course, it was a bit difficult for Jon to then get off the elevator because his head was just slightly wider than the door after all that adulation from his fans.

Jon is indeed witty and has a wonderful sense of humor, but, as Machiavelli is one of his idols, it tends to have a bit of a bite sometimes.

APMP: Given this forum to speak candidly, what can you tell us about our Jon that we don't already—but might be keen to—know?

BJ: The expression is, "What happens at an APMP conference stays at an APMP conference," right? So I can't tell you about a certain photograph I have of Jon from the APMP conference held in Phoenix, but I'd encourage people to ask him about it.

Jon and BJ match their wits in a competitive match of tennis Wii.

"*The pressures of the economy are as much of an opportunity for proposal teams as a threat.*"

budgets, what proposal management practices can you recommend to corporate proposal groups for stretching their B&P dollars in tightened economic times?

JW: You know what? I hate losing. And the starting point, as it's always been, is therefore to qualify opportunities robustly. This is even more important in a tough economic climate. With fewer deals to chase and more time on their hands, salespeople become ever-more desperate to chase every deal. It takes courage to be robust and to help the organization to spot when an opportunity's not worth doing. Most proposal folks, in my experience, are too quick to say "yes," even if "yes" will involve late nights and cold pizza.

Then it's about working smarter: if you can eke out finances or time to teach people how to do proposals better, to develop that high-quality Word template for your responses, to build that library of really good pre-written content—then you'll become so much more efficient. And if you can focus the resources of the proposal professionals in your business on the most important deals—enabling salespeople to write the smaller, run-rate proposals themselves—then you'll clear some bandwidth to make life easier.

That said, let's be positive. The pressures of the economy are as much of an opportunity for proposal teams as a threat: when has it ever been more important for organizations to win the deals that they chase, and hence when has the need for first-class proposal management ever been more important to C-Level executives? *Carpe diem!*

JW IN PRINT AND CONFERENCE

Jon is the co-author of "The Proposal Guys," the popular proposal management blog (www.theproposalguys.com). His published articles include 'The Five Step Plan to Better Bids' (*Supply Management*), a series of features in 'Marine Trader' on proposal best practice, and "Pre-Written Content: Publish and be Damned?" (*The Proposal Management Journal*, winning the APMP Insight Award).

He presents regularly to great acclaim at sales, proposal, and purchasing events: recent slots include acting as Master of Ceremonies (with colleague BJ Lownie) throughout the 2009 APMP international convention and delivering the opening sessions at both the 2007 and 2008 UKAPMP conferences. Jon also leads courses for the Chartered Institute of Purchasing & Supply, training procurement staff to write better RFPs and to engage more effectively with bidders. In October 2005, Jon delivered mainland China's first-ever public proposal training course in Shanghai.

Author Bio

R. Dennis Green is a management consultant, writer, and proposal practitioner with more than 25 years' experience. He is an APMP Fellow recognized for service as Proposal Management's founder and first Managing Editor (through 2003) and as founder and first president of the National Capital Area chapter. Email: rdengreen@aol.com.

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Engineering a Win Theme

A Scalable Proposal Method for Technical Sales Environments

By Michele Rochon

Companies can create special proposal development techniques that demystify the process of creating win themes in their proposals. This is especially true for consulting engineers. The technique described in this article includes 10 steps and a path to maturing a win theme.

Buyers of Engineering Services

Buyers of professional engineering services include governments and private sector organizations worldwide. Infrastructure, transportation, manufacturing, defense, mining, environment, aerospace, software, and telecommunications all require their respective engineers. However, the buyers of engineering services in these disciplines produce different products for different buyers and users. They serve a range of customers, communities, cultures, and economies. Sometimes it seems the only thing they share is the need to hire consulting engineers. These consulting engineers often play key roles in proposal development.

Terms

In this article, a win theme is defined as an idea that recurs throughout a sales presentation or proposal and presents a thorough, compelling argument for a customer to accept the proposal over those of competitors. An engineering win theme specifically includes understanding a key customer issue, proposing solutions that specifically address that issue, and supporting quantitative evidence of the engineer's ability to deliver the proposed solutions.

Customer pain is defined as a customer need or concern. Examples include limited manufacturing facility capacity, deteriorating water infrastructure, or a safety hazard for military vehicles. It can also refer to specific engineering project challenges, such as public relations, schedule control, cost control, or anything that might emotionally burden or trouble the customer. In this article, customer pain and development opportunity are synonymous.

The Consulting Engineer

Consulting engineers tend to share a number of traits, not the least of which is bewilderment with the sales process and a strong preference for their comfort in the technical and scientific realms. For those engineers, writing win themes in proposals to persuade elusive and varied buyers can be a challenging process. Avoiding the florid territory of language and communication, they hope

the benefits to the customer will naturally materialize in what they propose. After all, the benefits are obvious to the engineer; why would they not be clear to everyone?

The Technique

There are techniques designed especially for consulting engineers that demystify the win theme development process. This article describes one such technique that includes 10 steps and a path to maturing a win theme, from creating rudimentary awareness of customer pain to writing a proposal of genuine strategic partnership and shared business advantage.

The Ideal Engineering Win Theme

Example: We are aware of the challenges you face with <Project A>, particularly with <Issue 1>. This will present <Organizational Challenge A> and <Project Management Issue B> and will take approximately <Time Period> for our team of designers to complete. The <Number of Design Reviews> and <Our Project Management Approach> will be instrumental in delivering <Outcome A> and <Outcome B> for your peace of mind.

<Specialist 1> and <Specialist 2> were pivotal in addressing <Issue 1> while delivering <Relevant Project A> for <Comparable Customer A> and achieved a <Quantified Evidence> reduction in <Issue 1>. In fact, <Comparable Customer A> reported our results to be far beyond their expectations. Our team, including <Specialist 1> and <Specialist 2> will employ <Action 1> for this project, which was proven to deliver <Outcomes A and B> on our <Relevant Projects A, B, and C>, and we will do it at a reduced cost in a compressed time schedule.

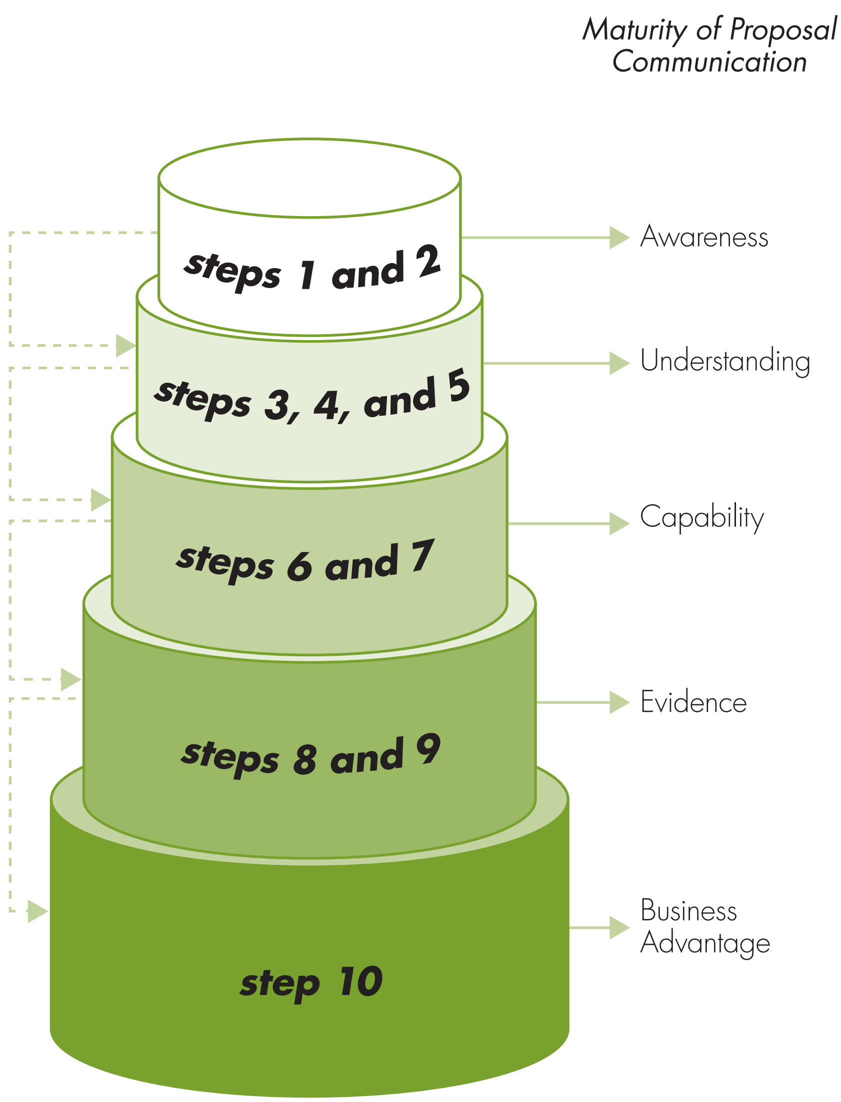
In this example, the writer demonstrates understanding and appreciation of customer pain. He subtly touches emotional dimensions with a phrase like "peace of mind," provides evidence that the proposed personnel or technology has successfully satisfied other customers with similar requirements, and plainly states the benefits the customer can expect. This general structure is applicable for an engine design for a jet manufacturer, a process

A Model for Win Theme Development

At baseline we characterize client pain, recognize critical success factors, and deconstruct desired outcomes.

We graduate to identifying differentiators with the ability to solve specific problems, reduce client pain, and add value. We produce evidence of exclusivity to eliminate competitor problem solvers from the equation.

The process culminates in narrative argument that demonstrates business advantage and positions consultant and client for strategic partnership



for a recyclable material sorting facility, transmission sub-station for an electric utility, or any other requirement.

Ten Steps

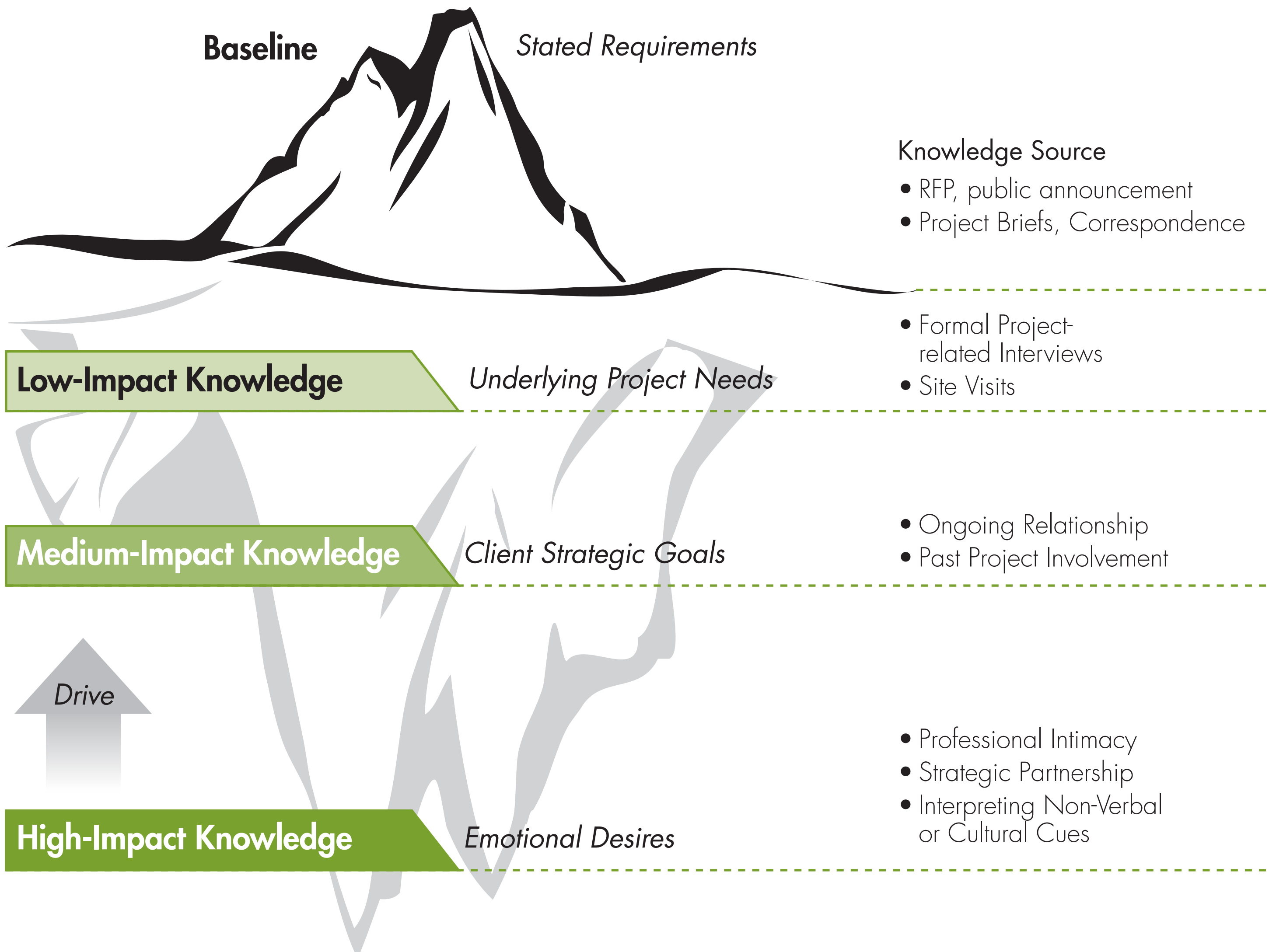
The 10 steps that can get an engineer's win theme to this state of grace are summarized, organized into a table, and described below:

- ***Step 1: Key Issue or Problem Statement***—Identify customer pain. Answer the question: what keeps this customer awake at night?
- ***Step 2: Critical Success Factors***—Identify change, conditions, and technologies that will contribute to success or obstacles that will hinder it.
- ***Step 3: Schedule***—Identify the customer's desired delivery time and critical project milestones that relate to this issue. Consider a range of possible solutions and how they can be achieved while satisfying the desired delivery time.
- ***Step 4: Process***—Identify the customer's desired process for project management and design delivery, and how the project will be integrated with the customer's current operations. Consider how the range of proposed solutions can accommodate or introduce positive change.
- ***Step 5: Desired Outcomes***—Identify the "afters," assets or benefits to be enjoyed once the project is complete.
- ***Step 6: Features***—Communicate what is being proposed. This can include things like such as technology, design, advisory services, scientific study, or project management.
- ***Step 7: Benefits***—Communicate the benefits. How will the customer's pain be alleviated? How will the project be delivered to make the process better for the customer? How will the customer's operation be better in the end?
- ***Step 8: Evidence***—Provide tangible evidence that the things proposed can, and will be, successful. Include quantified success with other customers facing similar key issues.
- ***Step 9: Exclusivity***—Identify why the proposed solutions and services cannot be matched by any competitors.
- ***Step 10: Argument***—Convert the results of Steps 1 through 9 into narrative argument.

An Engineer's Win Theme Development Tool

Step 1 Key Issue/Problem Statement	**Step 6 Features**
• Pain Table • What keeps the customer awake at night? • Quantify the issue. • Rank the issue's importance. • Type of issue—organizational, financial, schedule etc.	• Action and Approach • Qualifications and Capabilities
Step 2 Critical Success Factors	**Step 7 Benefits**
• Suitable and Economical Technology or Systems • Project Management or Design Methodologies • Operational Paradigms • Stakeholder Input and Consensus • Regulatory Approval • Environmental Impact Management • Managerial Decisions • Funding and Cost Control • Risk Mitigation • Quality Control	• "So what?" • Direct Desirable Results
Step 3 Schedule	**Step 8 Evidence**
• Critical Milestones • Other Operations • Stakeholder Operations	• Proof of Relationship between Feature and Benefit • Records of Success • Quantify • Direct Relevance
Step 4 Process	**Step 9 Exclusivity**
• Design Reviews • Customer-Engineer Communication Process • Value Engineering • Project Management Innovation	• We are the Only One • Our Innovation • Competitor Weaknesses
Step 5 Desired Outcomes	**Step 10 Argument**
• Specific, Measurable, Achievable…Ambitious	• Use Steps 1-9 to Construct the Argument

The "Iceberg" of Client Need/Pain Information



Step 1: Key Issue or Problem Statement

The information we have and how we use it determines the extent of our understanding of key issues, and ultimately determines our influence over the purchasing process. The RFP or other solicitation documents represent the tip of the iceberg for customer needs, issues, and priorities. Rather than seeing the RFP as the only source, the conscientious engineer approaches it as a small component of engineer-customer exchange. In preparation for win strategy achievement, we develop a system for knowledge sourcing. Through a targeted, pre-conditioned knowledge gathering process, we establish the full scope of the customer's pain.

Knowledge Sourcing and Types of Knowledge

Underlying Project Needs – Low Impact Knowledge

Underlying needs represent the customer's superficial, yet implicit expectations for the project. These may include stakeholder satisfaction, task prioritization and corresponding cost allocations, desired level of service, or preferences for specific technologies. This knowledge is usually accessible through bidder's conferences, interviews, and site visit activities provided during the customer's selection process.

This information is categorized as low-impact because all competitors have access to the same information, providing little or no advantage. However, often these issues are strongly linked to medium- and high-impact issues, so an analogous narrative can be highly persuasive, especially since strategic and emotional considerations cannot always be stated explicitly.

Customer Strategic Goals – Medium Impact Knowledge

Strategic goals represent knowledge available on the perimeter of the customer's inner circle; these are part of the vision for the project, the hopes and dreams, the perhaps impractical outcomes they have not asked for but expect you to anticipate.

For example, they might include installing infrastructure or technology that rivals those of their competition, thereby building brand and reputation. This type of requirement would not be stated in an RFP, but still has a strong impact on the purchasing process and choice of engineer. Past experience with a customer is the most reliable source for this information. If you have the

"the most powerful drivers of purchasing decisions also come from the most elusive; professional intimacy, strategic partnership, and non-verbal cues"

opportunity for an interview not subject to the rules governing bidder's conferences, you can probe further for this knowledge.

Emotional Desires – High Impact Knowledge

This model's understanding of customer pain reinforces how the most powerful drivers of purchasing decisions also come from the most elusive, time-intensive knowledge sources: professional intimacy, strategic partnership, and non-verbal cues. In a business friendship, we strive to develop maximum trust. Information can be exchanged with full confidence, a direct result of successful strategic partnership and business goals that are shared over time.

However, this type of relationship and this knowledge are not always easy to come by. In addition, if you are fortunate enough to have access to knowledge of emotional drivers, referring to them in a proposal is a delicate operation. Sometimes customers do not want to admit to these drivers, and seeing them on paper becomes counter-productive to the seller. With this model we can develop a win theme that hits emotional hot buttons contextually, framing underlying project needs in a way that sees deeper desires are met but does not broadcast those desires.

This involves talking about a superficial need (like a new water treatment plant) while making only subtle references to more emotionally charged issues (like the recent national survey that ranked this city's water as one with the poorest taste, a problem caused by the treatment system chosen 10 years earlier by your customer.)

Example: Our strategy has emphasized improvement of taste in the treatment formula and process. This will contribute not only to better health in the city but also an improved local and national perception of the quality of the city's water infrastructure. Benefits may even be as far-reaching as boosts in tourism, industry, and the migration of students and needed professionals.

Mentioning the disgrace of the national water survey would only be a painful reminder. Instead we focus on how we plan to remedy the problem and help the customer save face with sister cities and the general public. Stating possible benefits, as done above, refocuses the emotional experience in a positive direction.

Continued Knowledge Sourcing and Level of Effort

Knowing the information we have and how important it is to the purchasing decision also allow us to identify what we still need and what we are willing to do to get it. If intimate knowledge is needed, the capture plan must feature a fast-tracked relationship development program packed with face-to-face meetings. If this is not achievable later in the buyer's process, the key issues analysis might have to do what it can with the low- and medium-impact information available. Depending on expected return on investment, the effort can be trimmed down and applied along the scale of knowledge impact as appropriate.

An Engineer's Pain Table

Issue	Challenges	Worst Case Scenario	Ideal Scenario	Critical Success Factors	Desired Outcomes	Rank/Weight 1-10
Organizational						
Project Management						
Technical Conditions						
Stakeholder						
Budget						
Schedule						
Safety						

The Pain Table; a Tool for Understanding Key Issues

Once sufficient knowledge is gathered, we funnel it through a pain table to deconstruct, categorize, quantify, and rank the issue's importance in the context of the customer's operations.

In preparing for the project or study (for more hours than the engineer can probably imagine), the customer has considered the potential challenges, worst case and ideal scenarios, success factors, and outcomes. The example table above demonstrates how the pain table exercise is designed to replicate these thought processes. What we know about the project hopefully completes a good part of the table—the rest is up to our acumen and general knowledge of the customer. To get inside the customer's head and understand what is most important to him, an exercise like a pain table is extremely valuable.

Step 2: Critical Success Factors

For buyers of engineering services, critical success factors rarely end with the technology or system. The systems must be commissioned, owned, shared, operated, and maintained effectively, all of which begins with design. Often, the shared management of risk is also an expectation of the engineering customer. In many cases, the engineer must conceptualize a solution at the proposal stage to be seriously considered.

Conducting customer pain analysis and developing complete problem statements help us recognize critical success factors. For engineers, these typically fall into the following categories:

1. Suitable and Economical Technology or Systems
2. Project Management or Design Methodologies
3. Operational Paradigms
4. Stakeholder Input and Consensus
5. Regulatory Approval
6. Environmental Impact Management
7. Managerial Decisions
8. Funding and Cost Control
9. Risk Mitigation
10. Quality Control.

By reviewing critical success factors according to this list (or an expanded or reduced version customized for the organization), the writer can consider multiple angles of the issue systematically. This helps ensure that no keys to success are overlooked.

Step 3: Schedule

In this model, the delivery time frame is kept separate from other success factors because in engineering projects it can be the most detailed one. Here we identify critical milestones for the issue and understand how meeting them will be impacted by other customer and stakeholder operations.

The schedule can also provide flexibility for proposing alternatives to the preferred design. Consider the following example developed for a food processing company:

Example: We have provided a bid compliant with the preferred design and schedule, but would also like to propose an alternative egg processing technology that costs 12 percent less to operate over the lifecycle and will provide environmental benefits that exceed the regulatory requirements. It will take an additional three months to build, but we have numerous customers who have reported that the three months added to the schedule were inconsequential when compared to the cost savings they are now realizing in their operation.

If meeting the prescribed schedule was a low-ranking issue on the pain table, it can be an occasion for a discriminator like the one shown in the above example.

This 10-step analysis can both reveal such opportunities, and also can stop us from suggesting something that will get our proposal tossed in the trash. For an urban transportation project, for instance, schedule might be something that will not budge, as shown in the example below.

Example: To minimize disruption to traffic, the RFP states that the engineer must not deviate from the prescribed schedule. We have developed a unique traffic management plan, which we used successfully in <City> for <Project A>, that will reduce the number of months during which traffic will be detoured and maintain all the construction milestones identified in the RFP.

Step 4: Process

Step 4 aims to establish true appreciation of how the key issue can achieve resolution, depending on how it is integrated with the customer's existing engineering and project management process. Changes to the customer's process are not out of the question, but neglecting to appreciate the systems in place certainly is.

"Changes to the customer's process are not out of the question, but neglecting to appreciate the systems in place certainly is."

Example: We intend to exceed the city's standards and process for developing concrete noise barriers to a Sound Transmission Class rating of 26 by instead providing polyethylene noise barriers giving a rating of 28 as well as aesthetic visual screening for residential properties. The material is a simulated rock wall composite product that contains high-grade galvanized steel in both top and bottom rails. The barrier attenuates 98 percent of direct sound, is maintenance-free, graffiti resistant, fade-resistant, and can withstand extreme temperatures.

Step 5: Desired Outcomes

At Step 5, the challenge is to establish the "afters," the results left standing when the engineer has wrapped up. The key word at this step is insight, which is more than just an understanding of customer pain. It is insight into how all of the customer's requirements, including unspoken desires, can be resolved. This is the point at which the engineer should be able to see clearly into the customer's ideal future and discern its finest detail in critical success factors, scheduling, and process.

At the end of Step 5, we have much more than a key issues analysis or problem statement. We perceive the customer's pain as well as the path to resolving it. We can now share in their vision and identify the specific, measurable, and achievable tasks with the best chances of transforming it into reality.

Step 6: Features

At Step 6, we are ready to shift to a relative comfort zone, our offer. In this model, features are broken down between action and ability. Action represents measures to be taken in addressing the issue: value engineering workshops, operator training, optional environmental assessments, or system manufacturer site tours are examples of discriminating action in an engineering environment. Ability represents qualifications, experience and technical capability, encompassing both professional licensing and specialist backgrounds in specific engineering disciplines or systems.

Step 7: Benefits

The intense investigation of and reflection on the customer's needs and emotional desires conducted in steps 1 through 5 make the features of our offer flow more naturally into benefits. This is sometimes seen as the most challenging transition for the proposal writer to make. Translating a feature to a benefit is now a matter of identifying a direct result of a feature that is desirable to the customer in terms of increased quality of service, schedule control, cost monitoring and control, and risk mitigation.

Step 8: Evidence

A claim is only as strong as the quantitative and qualitative proof that supports it. Producing evidence of action, ability, and resulting benefits is a critical step to developing an effective win theme. Here we present proofs of the relationship between the feature and the benefit. These proofs come in the form of records of our past success employing the same actions or abilities to resolve similar issues for similar customers.

The challenges are to provide examples of past projects that are directly relevant, and to quantify that relevance in some way. Examples might include comparable population size of municipality, comparable factory outputs, or comparable structures for similar transportation systems. A number, whether it is population, cubic feet of water flow per second, specifications of a bridge, or number of units, is a powerful way to present evidence.

Step 9: Exclusivity

Up to now the model has made no mention of competitors. That is because controlling focus is one of its advantages—the topic is saved for the final steps to encourage the incorporation of all knowledge up to this point. Here we bring forward competitor analysis conducted during early capture planning or go/no go analysis and review it in the context of both our fully developed understanding of customer need and our service offering.

First, we develop a plan for framing our features, benefits, and evidence in a way that shows the customer meaningful distinctiveness. In other words, it demonstrates that we are the only engineers with this particular combination of capability and approach with the best chance of solving this customer's unique problems. We call attention to features of our experience or skills of our specialists that are unmatched by competitors.

Second, we recall competitor weaknesses from our capture exercises and develop a plan for ghosting them. For example, if you are mining engineers and your capability and experience are evenly matched with your principal competitor and the only opportunity for distinction is your local office, phrase the win theme like this:

Example: We understand the challenges you will face in day-to-day project delivery, given that the mine site is so remote. With our location in (City) as the closest engineering office to the project site, we will be able to provide the fastest response times during the critical phases.

Framing the offer this way reminds the customer that your competitor has no local office without actually saying it.

Step 10: Argument

Steps 1 through 9 position the writer to construct an argument that exercises all the customer's powers of reason and logic, but also touches emotional dimensions with the subtlest handling of unspoken desires.

Building prose in this systematic way can be painless for the engineer, particularly once the model has been employed several times and the steps have become habitual.

A Note on Customer Maturity

This model takes for granted that the customer is fully aware of their operational, technical, and financial challenges in a given project. It assumes that achieving higher maturity in awareness and communication is the duty of the engineer, the reward ultimately being a strategic relationship with the customer.

In many cases, customers may be unaware of the gravity of their issues or under-informed about available solution technologies. Ideally, the engineer will exploit these opportunities earlier in the sales cycle through face-to-face contact. This evens the playing field when it really counts. But if at the end game the customer still needs enlightenment, the model can be modified by adding the following exercises:

Step 1: Identify Gaps in Customer Understanding; identify gaps in customer understanding as a layer of the key issue or problem statement.

Step 2: Enlighten the Customer; identify critical success factors that include those related to enlightening the customer. This will help when constructing informative prose. Then concentrate on those related to the overlooked issues.

Step 3: Gaps in the Timeline; clarify the gaps that may appear in the customer's preferred delivery timeline.

Step 4: Gaps in Process; identify facets of the process that may be affected but overlooked by the customer.

Step 5: Outcomes the Customer May Not Have Desired But Should; desired outcomes in Step 5 now include outcomes we might make possible that the customer never considered, or outcomes we might encourage the customer to strive for.

"customers may be unaware of the gravity of their issues or under-informed about available solution technologies"

Steps 6 through 10: The goal in Steps 1 to 5 is to create desire for one or a particular set of outcomes. We are essentially telling the customer what they should want and why. Our offer should now flow from the work we have done in Steps 1 through 5. Instead of only burdening the customer with more pain, we have led them to a more complete solution that considers even those issues they may have neglected. We have demonstrated our ability to behave as true consultants.

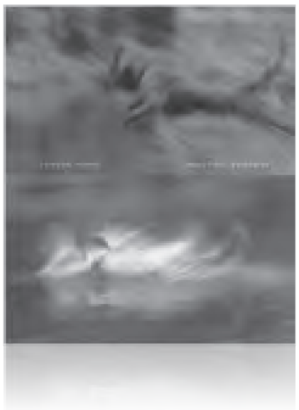
Tips for Using this Tool

Keep these tips in mind when using this 10-step technique:

- ***Assign a tool owner***. The technique needs a hero, someone who understands it inside out. This person is a specialist who would champion its use as well as regulate it. He has seen the tool used on many different sizes and types of pursuits. Ideally, the owner should be a business development or capture/proposal manager. In the absence of this role, individual account manager/engineers who habitually provide business and sales analysis to the group are most suitable.
- ***Learn how to use it in various ways***. Scalability is one of the technique's major benefits. Applications can range from minimal: using it as a learning example, following the steps only as a guideline and only referring to the model conceptually; to optimal: following each step for each individual key issue for every pursuit and using the table as a storyboard or a precursor to storyboards.
- ***Adjust it for business development maturity in your team***. Use terminology that your team is familiar with and reduce the level of detail based on readiness for complexity in sales process.
- ***Make it intuitive***. No matter what the scale of its use, the technique is most effective once its steps and objectives have become habitual. Therefore, use it often and consistently.
- ***Keep records***. Keep your win theme worksheets as well as the old proposals and RFPs. Some thought processes are recorded there that do not appear in the proposals and could be valuable later.

Author Bio

Michele Rochon is a business development and marketing professional with 12 years' experience leading marketing, capture, and proposal processes for the consulting engineering industry. Educated in marketing and communications at the University of Manitoba, she has worked for four prominent multi-national engineering firms: Stantec, AECOM, TetraTech, and GENIVAR. A three-year member of the Association of Proposal Management Professionals, Ms. Rochon is very interested in business development process development, sales in technical environments, and strategic planning for engineering consultants. She can be contacted at Michele.rochon@genivar.com.



Beautiful Evidence

Edward Tufte

Graphics Press LLC
$52.00

by: **Jim Hiles**

Beautiful Evidence is the fourth book on visual evidence by Edward Tufte. Edward Tuft is a Yale Professor and recognized expert on the conversion of all forms of seeing (words, numbers, images, diagrams) to showing or presenting. This volume enlightens the reader in two main areas: detailing effective methods for showing evidence and providing tools for assessing the credibility of presented evidence.

APMP members and *Journal* readers are no strangers to the ideas behind effective proposal and presentation visuals. Common topics encountered in the daily grind of new business development and proposals include a number of central tenets concerning visual displays. These include: ideas presented in pictures are absorbed easier and retained longer, proposal evaluators are time-challenged readers needing to quickly discriminate between proposals, and compelling visual explanations can make a big difference. Edward Tufte's life work of digging deeply into the intersection of art and science on evidence presentation takes the reader to a new and higher plane of enlightenment in this area.

Edward Tufte is an author held in very high regard by many. He is an iconoclastic visionary and outspoken master and teacher. He holds a BS and MA in Statistics from Stanford and a PhD in Political Science from Yale. His journey from statistics into the field of visual evidence was accelerated by an early experience he had teaching statistics to a group of journalists who were studying economics. His homepage (http://www.edwardtufte.com/tufte/) is uncluttered, junk-free, and data rich. A visit presents the viewer with the stark contrast between his methods of visual presentation and the conventional wisdom of the majority of data presenters.

Beautiful Evidence is a coffee table-sized book laid out in nine chapters. The last two focus on the presentation of sculptures and the impact of pedestals on the presentation. These chapters are likely of less interest and direct applicability to proposal management and business development professionals. One chapter is devoted to a critique, or rather, an eloquent lambasting of the popular tool, PowerPoint. Those of us who rely on and work with this tool will find much here that sheds light on the shortcomings of reliance on this tool as an evidence presentation platform. The remaining six chapters are a treatise on the main themes of the book.

Readers of *Beautiful Evidence* with a singularly minded focus on how to win more work using compelling visuals to drive a reader to a specific conclusion have come to the wrong place. The author has a clear bias against leading data viewers to a specific conclusion, particularly one not supported by the data presented. The author takes the reader to the core purpose of evidence presentation: to assist thinking. The author's central notion in this regard is that there are three universal analytic issues confronting data consumers: 1) understanding causality, 2) making comparisons, and 3) dealing with multivariate complexity.

Beautiful Evidence has an entire chapter devoted to the six fundamental principles of analytical design. This chapter summarizes these principles in a single image by dissecting Charles Minard's data-map of the losses of men of the French army during the French invasion of Russia in 1812. A standout observation of import to business development and proposal

> *"The best way to improve a presentation is to get better content. Design devices and gimmicks cannot salvage failed content."*

management professionals is driven home by the author in this chapter. This observation is "the best way to improve a presentation is to get better content. Design devices and gimmicks cannot salvage failed content."

The author encourages the use of data-rich illustrations with all available data presented. Every data point has value, and trends and patterns emerge when these data points are viewed in composite. Tufte develops the ideas of "to the point," "memorable," and "located in text" where they are discussed in presentations, and names them sparklines. The early chapter devoted to sparklines was, for this reader, a particularly impactful chapter. Specific examples of data-intense, high-resolution fields used through history and in divergent fields are examined by the author. Of particular attraction to this reader was the concept of condensing information and enabling the viewer to make insightful observations, often in the face of conventional wisdom that believes otherwise. A near concurrent reading of *Moneyball* by Michael Lewis really drove this point home.

Beautiful Evidence is a thought provoking read. Reliance on evidence and sorting through various presentations are applicable to all. The author has expanded his comprehensive body of work on visual evidence in this volume. The application of the principles in *Beautiful Evidence* by business development and proposal management professionals will increase the value and impact of your visual presentations.

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

Exceeding Expectations:
Reflections on Leadership

General Bill Looney

Enso Books, 2009

$17.99

by: **Jim Hiles**

Exceeding Expectations is a brief book, weighing in at 175 large-texted, multiple-line spaced 5" x 8" pages. The author's aim is to share lessons on leadership learned during his 40-year US Air Force career. He claims to have commanded more organizations than any other Air Force general officer in history. The Wikipedia page devoted to General Looney (http://en.wikipedia.org/wiki/William_R._Looney_III) attests to a significant number and includes a 2007 quote that provides insight into the genesis of his book: "*The vast majority of Airmen we train are going to be somewhere in harm's way within the next year or two. It is up to us to impart to them the talent and skill they need to accomplish their mission in a world-class fashion and at the same time make sure we get them back safely to the families that love them.*"

Exceeding Expectations starts with the philosophy of ego-checked leadership. In the author's parlance, he is sharing experiences from his own striving to create environments that were about the worker and not himself as a leader. Eleven central themes are presented as "observations, not absolute principles" intended to serve as a guide to success. He appears to define success as alternatively an organization that exceeds expectations or a leader who exceeds their follower's expectations. This is the one bias present in the book: the notion that there is always a set of predefined success goals in an organization worthy of aspiration. Perhaps this bias comes from the extrapolation of lessons learned while leading highly structured military organizations.

There are many applications of these lessons to the leadership challenges faced by proposal managers. One noted absence, however, is any discussion or leadership lesson focused on the occasional need to question a standard of success, such as challenging a bid decision that recognizes the established standards are not the correct measure of success.

There are, however, many pearls of wisdom in *Exceeding Expectations.* In the section entitled "Lead from the Front," the author provides a specific example from when he was placed in a leadership position in a flight squadron with a poor performance record. As part of turning the organization around, he chose to lead a complex and challenging training flight. He "had observed that working hard on a brief and doing it well set the tone for the entire mission." So he over prepared for the brief, set a confident tone, and led a successful mission. In a similar manner, a well-prepared proposal kick-off can establish a positive and professional tone that sets the stage for team success. In this same section, another vignette is offered that should strike a chord with every business development professional. The author takes the time to emphasize the importance of a debrief, and goes on to state that of all the facets of the flight, the debrief is the most important and is where the real learning takes place.

One of the central themes of *Exceeding Expectations* is that it is not that difficult to create an organization that exceeds expectations. The author makes the observation that most followers expect their leaders to be self-absorbed and self-serving. In a predominantly risk adverse environment, most followers expect their leaders to procrastinate and, when finally forced to make a decision, to make the one with the least associated risk. The author's point about creating an organization that exceeds expectations is based on this general observation and its corollary: that followers really appreciate a leader who gathers the facts, assesses the situation, and makes a decision—all in a timely manner. The conclusions are that these are learned and repeatable leadership behaviors and that organizational members will appreciate and rise to meet the challenge of exceeding expectations. This applies both to putting forth a complex, yet succinct, value proposition in a proposal and to executing dangerous military maneuvers.

Bracketed by introductory and concluding chapters, there are 11 chapters. Each of the 11 chapters focuses on one leadership observation, including the previously mentioned "Lead from the Front." In the leadership book genre of ex-military leaders espousing wisdom, Bill Looney's volume is a welcome addition and offers valuable insights that one can directly apply to any number of common management challenges.

Executive Summary Secrets:
Proven Six-Part Forumal to Persuade Evaluators to Award the Contract to You

Olessia Smotrova-Taylor

OST Global Solutions, Inc. 2009

$147.00

by: **Jim Hiles**

Olessia Smotrova-Taylor is an outspoken advocate of compelling proposals. Her book *Executive Summary Secrets - Proven Six-Part Formula to Persuade Evaluators to Award the Contract to You* will transform your outlook and approach to executive summaries.

Smotrova-Taylor draws inspiration for an effective executive summary from the best parts of direct response marketing that seek to elicit reader action. Her six steps give the right information in the right order to engage buyers and bring them to a call to action. In her words, "this technique applies to proposals because you are not selling through a dialogue with the government – you are delivering a one-way message, and then waiting for their response. Your task is to make this one-way message as convincing as possible because you may not have another chance to get your customer's attention."

She grew up in Uzbekistan and studied art before starting her career as a writer for the *Financial Times* of London, and later as a proposal manager and business owner. Fine examples of her artwork adorn the walls of the corporate headquarters of her company OST Global Solutions and reflect the style of the country of her youth. Her unique combination of artist and business professional shine through in *Executive Summary Secrets*. Original illustrations by the author complement creative and intuitive idea presentations that ensure quick reader understanding and appreciation of advanced proposal techniques.

*Executive Summary Secrets i*s set up as a workbook; a practical, how-to guide. There are thought-provoking questions with space to record answers, and exercises that build on each other and provide for immediate practical application of the six-part executive summary formula.

Too many volumes, workbooks, and instructional materials have gone the way of less is more. Smotrova-Taylor has gone in the opposite direction. Not by writing an excessively wordy narrative, but by including detailed examples and a rich description of "how" that takes the reader to a deeper level of understanding and includes practical and actionable advice. That advice includes examples from her experiences shepherding busy executives through executive summary completion. A section of *Executive Summary Secrets* is devoted to dangerous misconceptions about executive summaries and includes three specific strategies for overcoming the common danger of the wrong party being responsible for the executive summary. Hint: The correct person probably does not have the term "executive" in their title.

Additional topics covered in this informative book include questions and answers that are keys to preparing a persuasive executive summary, the six-part executive summary formula, advanced techniques, the seventh part of the six-part formula, and a bonus section on editing tools and techniques.

I purchased *Executive Summary Secrets* on a Wednesday. By that Friday I had used the six-step formula to elicit features, benefits, and proofs from a subject matter expert and incorporate them with great effect into a revision of two executive summaries. The format and presentation of Smotrova-Taylor's insights were so clear and compelling that the following week I incorporated the six-step formula into a storyboarding workshop with two bid teams. These bid teams completed an in-class exercise where the six steps transformed and refined their messaging. Participant comments from this session included "I immediately applied the 6 Steps to a draft Exec Summary. It definitely tells a much more compelling story! You guys should consider holding more sessions to expose others! "

Chances are high that Smotrova-Taylor is a familiar figure to many APMP *Journal* readers, through her prolific blogging, writing, and presence at APMP events. She has plans to continue book-level publication of her thoughts and approaches for other proposal elements. *Executive Summary Secrets*, the first of a potential series of illuminating volumes from her, contains a number of immediately applicable ideas, tips, tools, and techniques for proposal professionals.

The Complete Idiot's Guide to Getting Government Contracts

John C. Lauderdale III

Alpha Books, 2009

$19.95

by: **Keith Costa**

You do not have to be a complete idiot to profit from reading John Lauderdale's *The Complete Idiot's Guide to Getting Government Contracts*. Whether a newbie to the business of providing goods and services to government customers or a seasoned pro, this gem of a book has something to offer everyone interested in making money in this multimillion-dollar marketspace.

The scope of the book is extraordinary, covering every aspect of the acquisition lifecycle for government contracts, from setting the stage for success to proposal development to post-award activities—as well as everything in between. Each chapter is chock full of good advice, clear explanations of best practices, and step-by-step instructions for winning new business. The information is carefully organized and presented in manageable chunks so the reader never becomes overwhelmed. Procurement processes are examined in sequential order, making it easy for readers to go through the book cover-to-cover or pick and choose chapters for study as they see fit. Lauderdale's expertise—earned from decades of experience getting government contracts—is evident throughout. Given such a wealth of attributes, the book more than suffices as a how-to guide for those seeking to hone their business development, capture management, and proposal development skills.

Readers pursuing federal contracts for large or small businesses are most likely to benefit from Lauderdale's book. While many of his principles apply equally to federal, state, and local government business—for example, ideas about cultivating opportunities—the book is primarily geared toward the federal contracting environment. For this reason, Lauderdale is careful to point out from the start that state and local governments operate under different rules than the Federal Government, and a business without strong local presence should partner with ones that do to avoid the "carpetbagger image." Still, the book's emphasis on the federal contracting world raises the question whether it should have been titled *The Complete Idiot's Guide to Getting Federal Government Contracts*.

Winning federal contracts is by no means easy or cheap, and those taking this "long and winding road," as Lauderdale (channeling Paul McCartney) describes it, need to understand and apply what successful contractors have already learned. For example, successful contractors know they must offer goods and services that address customer wants, and they must differentiate these offerings from the competition. Further, these contractors only bid to win. On this last point, Lauderdale has some choice words for the company convinced it cannot win but bids anyway hoping to establish its name with the customer: "Let's not even delve into the issue of why you have a negative attitude about your work. Setting that aside, we come to the reality that if you bid and lose, you *will* have a name with this particular government customer, but, sorry to tell you, that name will be *loser*! No one wants that."

"Winning federal contracts is by no means easy or cheap, and those taking this 'long and winding road,' as Lauderdale describes it, need to understand and apply what successful contractors have already learned."

> *"Some of Lauderdale's best chapters for explaining the federal contracting environment are those offering marketing and teaming advice."*

The rewards of pursuing federal contracts make the time, money, and other resources invested worthwhile, as Lauderdale repeatedly emphasizes. Monetary gains aside, vendors benefit from a legal mandate requiring federal clients to pay their bills within 30 days. Steady cash flow can mean life or death for any company, but particularly for smaller businesses.

Some of Lauderdale's best chapters for explaining the federal contracting environment are those offering marketing and teaming advice. He provides specific guidance on developing marketing and capture plans and includes a sample capture plan in an appendix. Actualizing these plans requires knowing the customer, and this means identifying what Lauderdale calls the "precipitating event"—the reason, or reasons, why a contracting opportunity exists in the first place."If you don't understand the precipitating event, your response is very like to fail to address the customer's real concerns," Lauderdale notes that adding these concerns may not be apparent in a request for proposals. Elsewhere in the book, he discusses how to assemble a winning team, and, for small businesses, how to shop one's wares among the large system integrators in pursuit of a government contract. The book also covers conducting market research, assessing the competition, avoiding ethical landmines, and pricing.

All of the chapters in the book feature strategically placed sidebars that highlight key points. These include tips from a "Government Insider" perspective; "Beltway Buzz," or insights about government contracting; "Red Flags" warning readers of potential problems they might encounter; and call-out boxes for definitions that are worth memorizing. A good Beltway Buzz example is found in a chapter on creating technical volumes of proposals: "Already is the most powerful word in proposals. . . . Because of the evaluators' wish to avoid risk, the word already gives the evaluators a warm feeling about your solution. 'Hey, this offeror is already doing this kind of thing!" In addition to providing valuable information, these sidebars break up the text in the book, making it an easier read.

If there is an area with room for improvement in Lauderdale's book, it is in an earlier chapter on the proposal development process. Specifically, this chapter, on controlling text creation, is a little too light when discussing storyboards. To his credit, Lauderdale acknowledges the importance of storyboards, and the dangers of jumping into the writing process without them. However, he does not spend enough time on this subject to teach his readers how to develop a good storyboard. A sample storyboard—even if partially completed and placed in an appendix—would have been a welcome addition. At the very least, he could have driven home the point that a well-developed storyboard is an opportunity to specify and validate how a company will address the customer's top concerns, or "hot buttons." This approach would have tied in well with another area of the book where he stressed the need to convey to the customer how a proposed solution will solve its problems.

However, any omissions about storyboards or some other subject of interest to readers certainly do not amount to fatal flaws. Overall, Lauderdale delivers the goods when it comes to explaining the complex processes involved in getting government contracts and helping readers navigate the federal contracting environment. Indeed, his book is remarkable for how much information it comfortably packs into its nearly 350 pages. For those who want to delve more deeply into the topics he covers, Lauderdale identifies a number of helpful Websites, service providers, and other resources. Because of its high-quality content and pleasing presentation, his book is a superb training tool or reference source for anyone who wants to compete effectively for government contracts.

Keith Costa is Senior Technical Writer for Defense Group Capture at CSC, where he has provided support for new business operations and proposal development. Keith's background includes more than a decade of experience as a journalist covering the foreign affairs, national security, and the defense industry.

So You Want to Write an Article?

A Brief and Encouraging Guide to Writing Articles for *Proposal Management*

By Jayme A. Sokolow, Ph.D.

Step 1:

Send Ali Paskun, the Managing Editor, and me (Jayme) an email with a brief description of your proposed article. We will respond to your description with advice about how to develop your idea into an article.

Step 2:

Send me (Jayme) an outline of your article if this has not been included in Step 1. This will enable me to provide more detailed advice.

Step 3:

Send me (Jayme) a polished draft of your article. If your article is ready, we will send it out to two peer reviewers. If your article needs further development, I will provide you with advice for your next version.

In our “Guidelines for Authors,” we provide potential journal writers with guidelines for submitting articles to *Proposal Management*. I would like to go beyond those guidelines to explain how you can become a successful author.

Proposal Management depends on volunteers to write articles. In many academic institutions, researchers and professors are expected to publish scholarly contributions to their fields of expertise. In contrast, in the field of proposal management, publications are neither expected nor encouraged in most companies. Nonetheless, at *Proposal Management* we have learned that many proposal professionals are very good authors.

Over the years, we have received many outstanding articles from individuals in business and proposal development. They have written these articles because they enjoy writing and find the sharing of ideas, techniques, and case studies with their colleagues personally satisfying.

Most of our articles originate in the following ways:

- You make a presentation at an APMP roundtable or conference and decide to develop it into a full-blown article
- You become interested in a proposal-related topic such as how evaluators review proposals, do research on it, and decide to write about it.
- Your company has a novel and successful approach to some aspect of proposal development, and, with your company’s permission, you decide to do a case study.
- You have used an interesting proposal methodology, process, or procedure, and you decide to provide a tutorial about how to use it.

Often in academic journals there is little or no editorial guidance or revision. Articles are submitted, reviewed, and then published with just modest copy editing.

At *Proposal Management*, we do not take this laissez-faire approach. Instead, we like to work closely with authors from the conceptualization of their articles to the submission of the final version for publication because this process results in better articles.

If you are considering writing an article for *Proposal Management***,** I recommend that you take the following steps as depicted in the graphic above.

After your article has been reviewed, you will be notified whether or not your article has been accepted for publication. In many cases where an article has accepted, we share the reviewers’ comments (anonymously, of course) and ask for your final version. When articles are rejected, we either summarize the reviewers’ comments or share them with you so that you can revise and resubmit. Some of our best articles began with severe criticisms from reviewers!

Writing an article for *Proposal Management* is similar to doing a proposal, but without the accompanying stress. We expect authors to go through an identifiable process and multiple drafts. The results are the articles you read in each issue of *Proposal Management***.**

Our authors work very hard, but they find publication to be satisfying and rewarding. Many even enjoy the effort.

Please read the “Guidelines for Authors” and consider becoming an author. The journal wants you to share your insights, experience, and research with your fellow proposal professionals.

Author Bio

Jayme A. Sokolow, Ph.D., is founder and president of The Development Source, Inc., a proposal services company located in Silver Spring, MD, that works with businesses and nonprofit organizations. He is also Assistant Managing Editor and Chair of the Editorial Advisory Board of *Proposal Management*. He can be reached at JSoko12481@aol.com.

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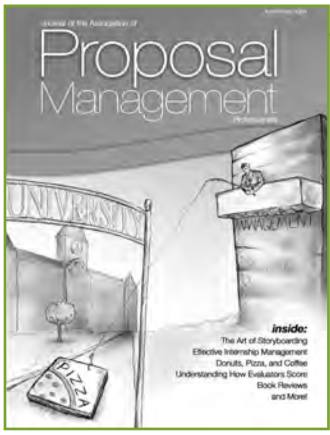

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